planswift 9.1

The #1 Takeoff & Estimating Software

User Manual

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PlanSwift 9 User Manual

The official PlanSwift 9.x series user documentation resource.

PlanSwift 9.0 - What's New?

Whats New in Professional Release 9.0

General:

- Undo! - now you can undo most changes.
- When emailing plans to other users, the ability to select individual pages from the list.
- Add columns to the "Open Job" dialog...example "Estimator" or "Due Date"

Interface:

- All new ribbon bar - more efficient use of the toolbar space
- Quick Search - search all commands in the ribbon bar, plus searching your current estimates, and templates at the same time
- New "Notes" sidebar...see all notes on the job in 1 place
- New docking system - (windows don't get lost)
- Multi-select capability - hold SHIFT or CTRL to select multiple items
- Color themes...Black, Blue, Silver

Navigation:

- Hyperlinks. Click hyperlinks on the page to either navigate to a URL or function as a bookmark to another page
- Search the pages window
- Folder structure for images: Now the user can group images in folders, such as "Architectural", "Structural", "Civil", etc.
- "Tabbed" browsing. Open multiple images at the same time...overall the software feels more like a "browser" for blueprint images, with powerful capabilities. Dock or undock tabs and move to additional monitors
- Hover navigation: Hover over arrows (up, down, left, right) to pan around the page (perfect for touch screens too)
- Takeoff / Image
- Templates

Lists:

- Database integration: Ability to create custom lists (example: Items, Customers, Divisions, etc.) that can be linked to database

Estimating:

- Database Integration: Link PlanSwift to any existing ADO compatible database (including Excel, SQL Server, MS Access) for Price Lists, Customer Lists, etc.
- Object oriented estimating (with Object Inheritance): We are introducing a new concept here. Each estimating assembly or formula can be "inherited" to other similar items allowing powerful plugins to be created with "Smart" functionality while digitizing.
- Modify item properties directly from the estimating screen
- Automatic units conversions - Enter values in IN, FT, M, CM, or any measurement type and it gets automatically gets converted

Reporting:

- Reporting: Greatly enhanced reporting capabilities. Sort & group the data any way you want, and save pre-built "Views"
- Calculated Column - ability to create a column that is stored only on the report (not on the items) and calculates on the fly
- Customizable page layout for reports (add logo, etc.)
- Modify item properties directly from the reports screen
- Excel 2010 Compatibility for the Live Excel integration

Language / **International**:

- Better metric compatibility
- Language Packs - Ability for the software to operate in multiple languages

Properties

- New Property/Field Types: CheckBox, Color, Memo, Image, Path, Slider Bar, and more (store these properties on any item)
- Friendly "Input" screen when editing properties
- Form Designer: Ability to give templates friendly form inputs by using the form designer

Development Platform

- New Concept of "Storages": Allows the user to control where their job data and templates are stored (folder on HD, in a database, in XML file, etc.)
- Much more open architecture - Every object (page, bookmark, area, linear, count, template....anything....has it's own XML based set of properties for storing/tagging additional information to. Perfect for plugins to piggypack on PlanSwift architecture)
- Ability to embed/integrate 3rd party apps into the software as a seamless solution (appearing as 1 software)
- Ability for Events/Methods to launch Executable Plugins
- New Script Editor window with built-in help files

Help / **Support**

- More integrated experience

Misc:

- Parts show what type of takeoff item they need dropped onto
- Export to Excel "Report": Ability to define a "Report" from an Excel template (such as Invoice/Estimate), and have it populated with Data from PlanSwift (this is different functionality than the existing Live Excel integration)
- SwiftMarket integration: The most powerful tool for buying and selling construction materials and services, now linked into the #1 takeoff software.

Scripts and Plugins

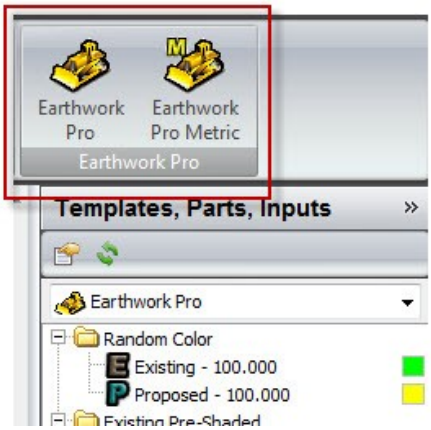
Custom Scripts and Plugins to help you become more efficient with the PlanSwift Software.

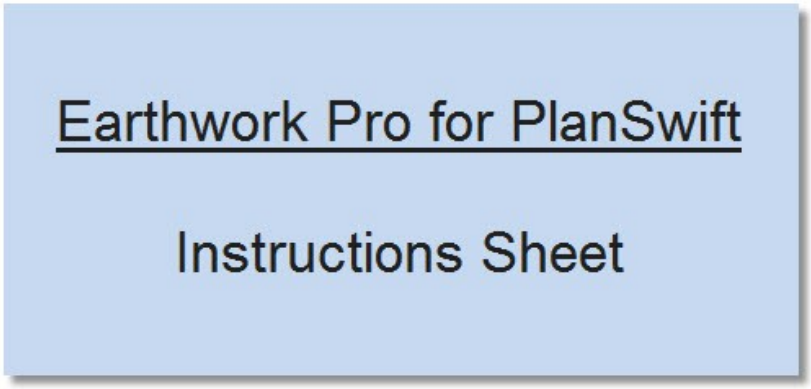
PlanSwift Certified Plugins

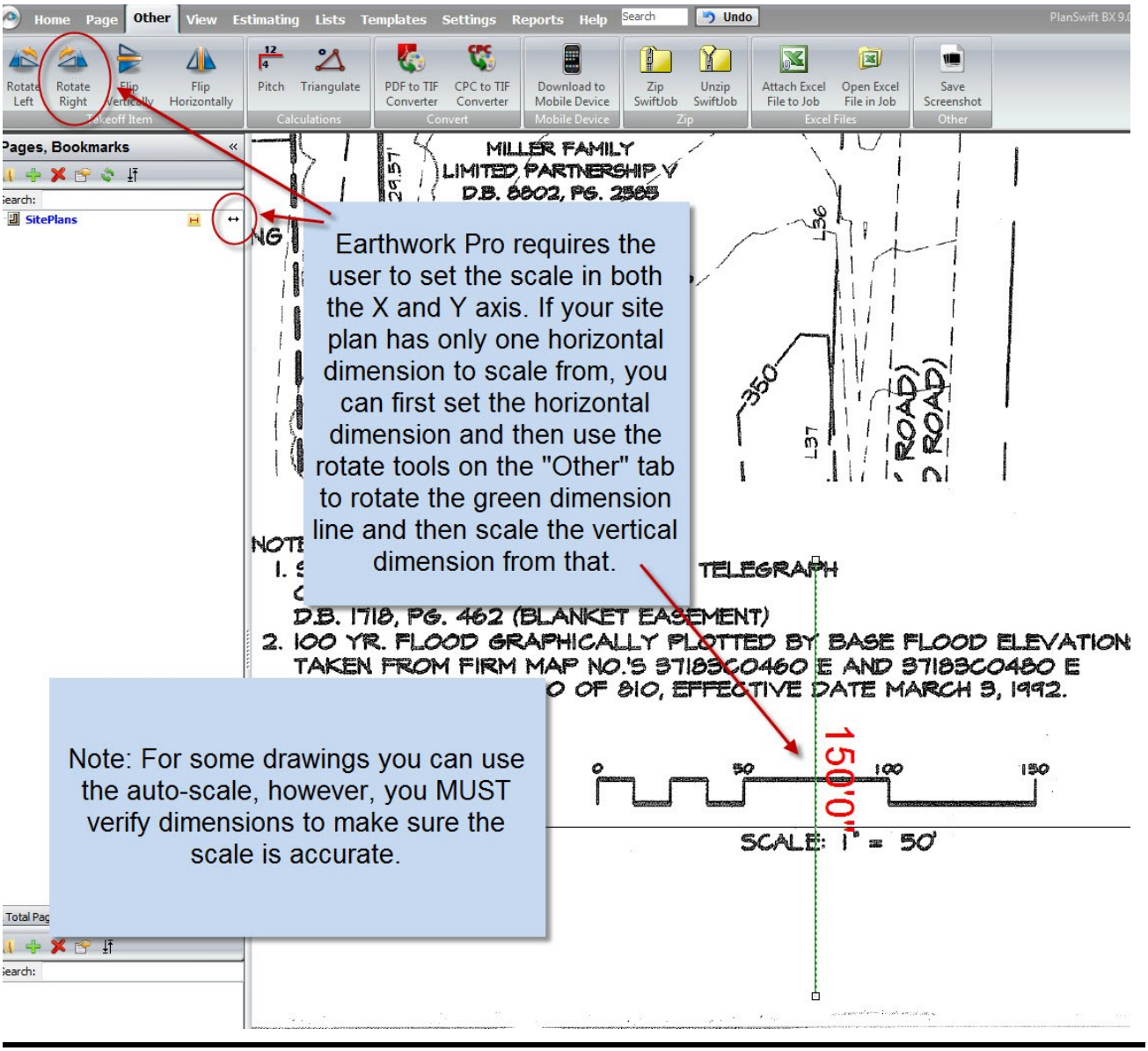
Plugins that are Verified and Supported by PlanSwift Support

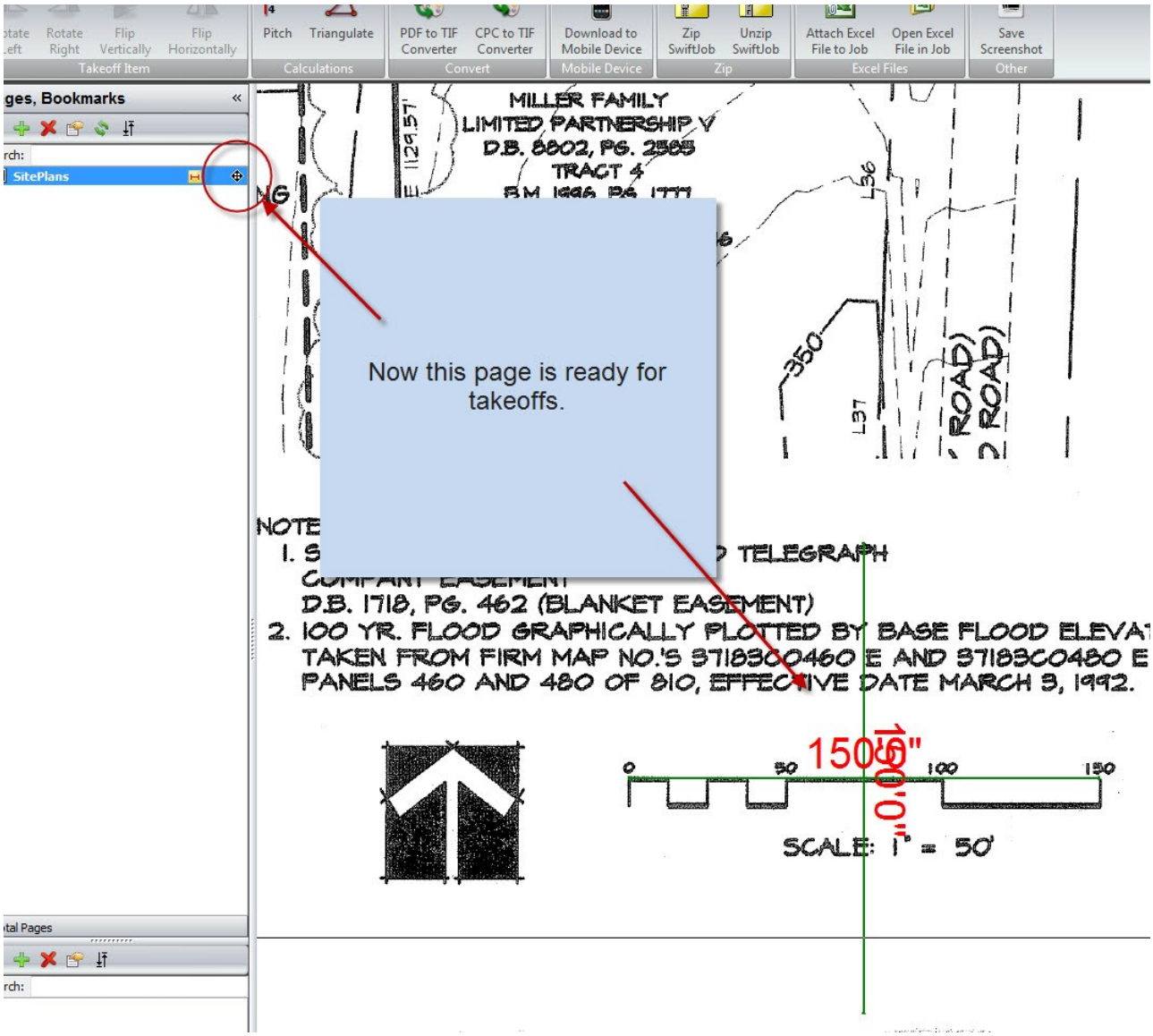
Earthwork Pro

This article contains the information necessary to use the features in the Earthwork Pro plugin.

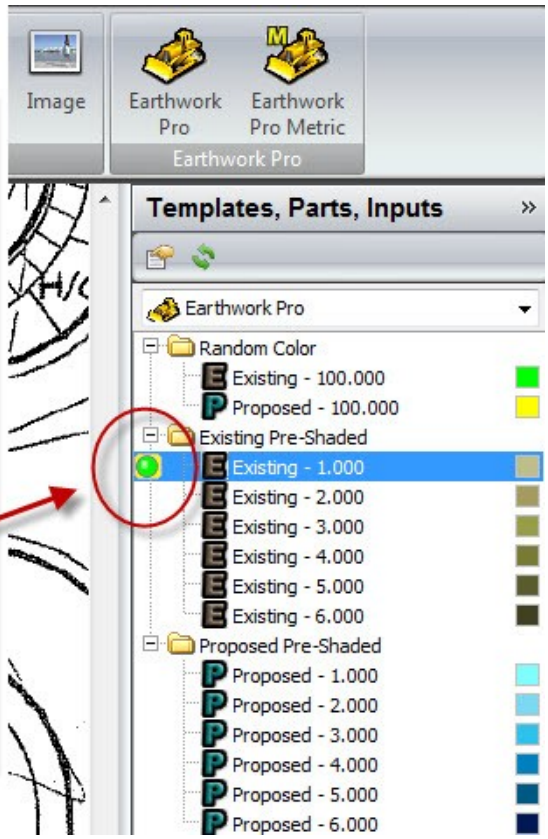


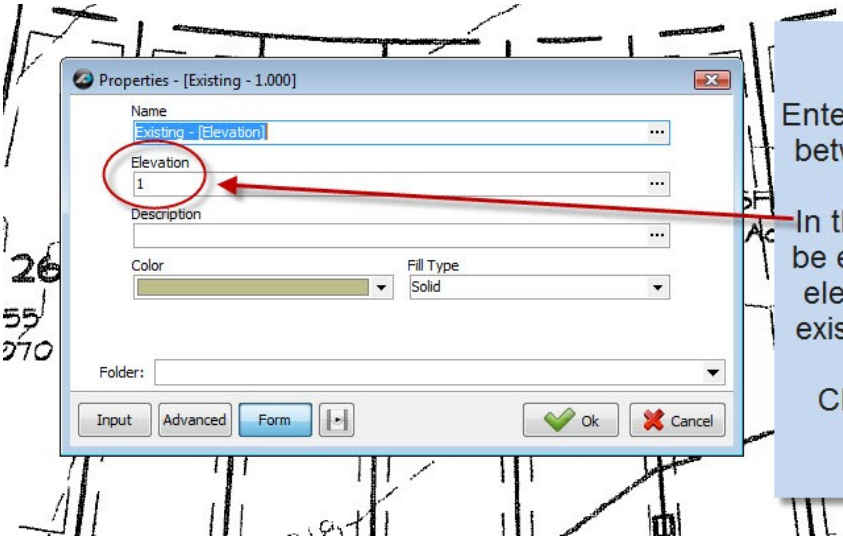



Home
Page
Other
View
Estimating
Lists
Templates
Settings
Reports
Help
Search
Undo
PlanSwift BX 9.0
Rotate Left
Rotate Right
Flip Vertically
Flip Horizontally
Takeoff Item
Pitch
Triangulate
Calculations
PDF to TIF Converter
CPC to TIF Converter
Convert
Download to Mobile Device
Mobile Device
Zip SwiftJob
Unzip SwiftJob
Zip
Attach Excel File to Job
Open Excel File in Job
Excel Files
Save Screenshot
Other
Pages, Bookmarks
SitePlans
Earthwork Pro requires the user to set the scale in both the X and Y axis. If your site plan has only one horizontal dimension to scale from, you can first set the horizontal dimension and then use the rotate tools on the "Other" tab to rotate the green dimension line and then scale the vertical dimension from that.
Note: For some drawings you can use the auto-scale, however, you MUST verify dimensions to make sure the scale is accurate.
MILLER FAMILY
LIMITED PARTNERSHIP V
D.B. 8802, PG. 2585
TELEGRAPH
D.B. 1718, PG. 462 (BLANKET EASEMENT)
2. 100 YR. FLOOD GRAPHICALLY PLOTTED BY BASE FLOOD ELEVATION
TAKEN FROM FIRM MAP NO.'S 37183C0460 E AND 37183C0480 E
O OF 810, EFFECTIVE DATE MARCH 3, 1992.
0
50
100
150
150'0"
SCALE: 1" = 50'


Rotate Right
Flip Vertically
Flip Horizontally
Takeoff Item
Pitch
Triangulate
Calculations
PDF to TIF Converter
CPC to TIF Converter
Convert
Download to Mobile Device
Mobile Device
Zip SwiftJob
Unzip SwiftJob
Zip
Attach Excel File to Job
Open Excel File in Job
Excel Files
Save Screenshot
Other
ges, Bookmarks
SitePlans
Now this page is ready for takeoffs.
MILLER FAMILY
LIMITED PARTNERSHIP V
D.B. 8802, PG. 2585
TRACT 4
L36
L37
350
ROAD)
2 ROAD)
NOTE
1. S
TELEGRAPH
D.B. 1718, PG. 462 (BLANKET EASEMENT)
2. 100 YR. FLOOD GRAPHICALLY PLOTTED BY BASE FLOOD ELEVA
TAKEN FROM FIRM MAP NO.'S 37183C0460 E AND 37183C0480 E
PANELS 460 AND 480 OF 810, EFFECTIVE DATE MARCH 3, 1992.
0
50
100
150
150'-0"
SCALE: 1" = 50'
tal Pages

From the Templates, Parts, Inputs on the right side of PlanSwift, select one of the Existing templates. You can choose a random color or a pre-shaded color. Click the green button.

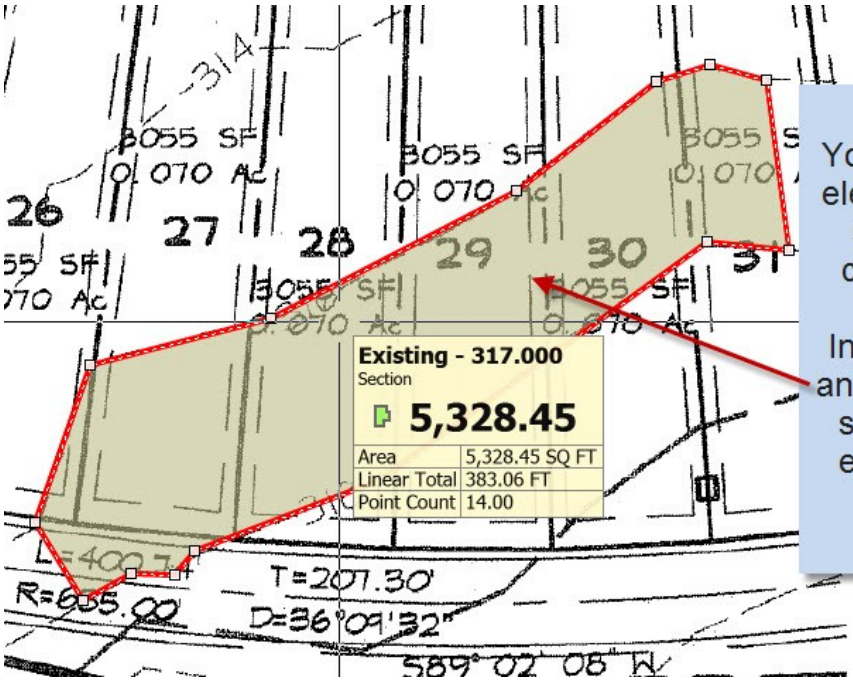




Enter in the elevation of the area between two existing contours.

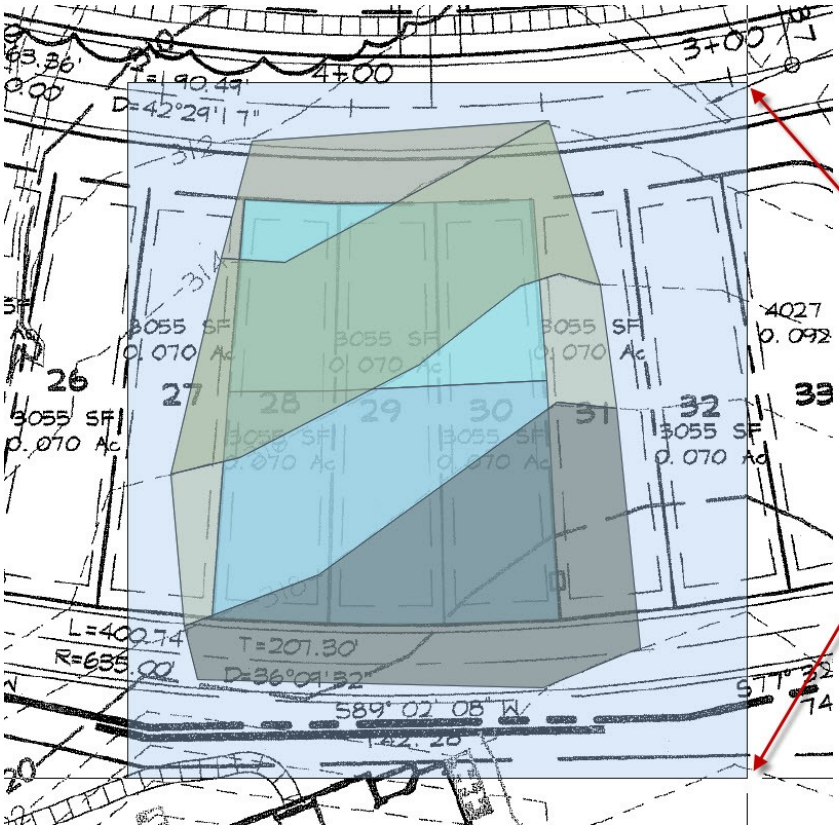
In this example we are going to be entering 317 as the average elevation of the area between existing contours 316 and 318.

Click Ok to begin digitizing.



You can digitize the area for elevation 317 over the entire site or you can just do a certain section of the site.

In this example we are only analyzing Lots 28, 29 and 30 so we only need to do the existing area across those lots.

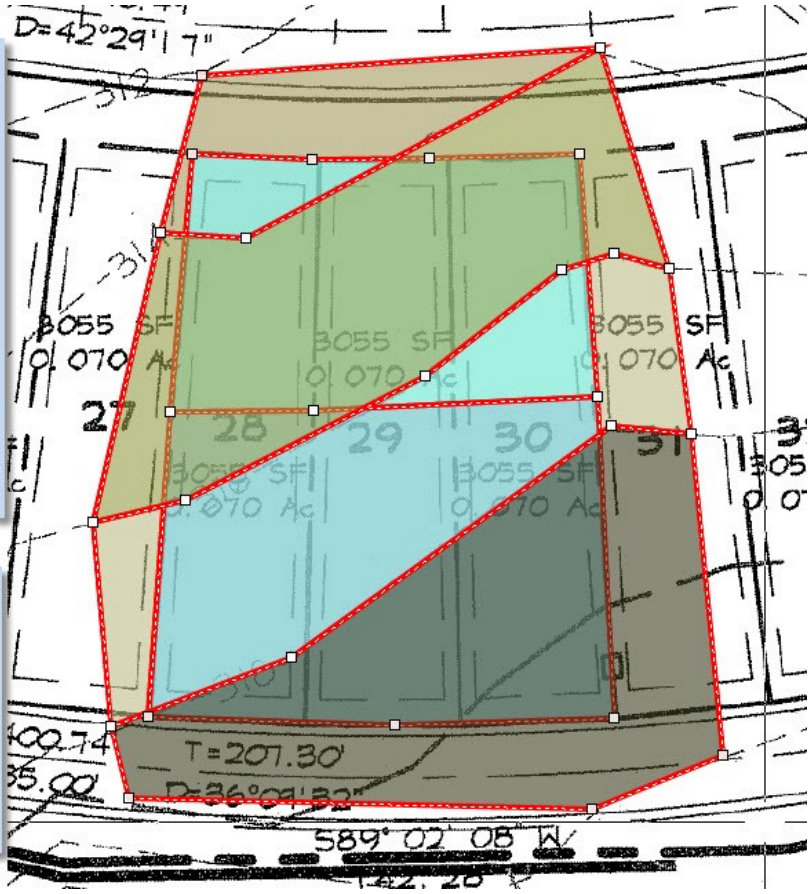


Now take your mouse, left click to drag and draw a box over all of the contours both existing and proposed.

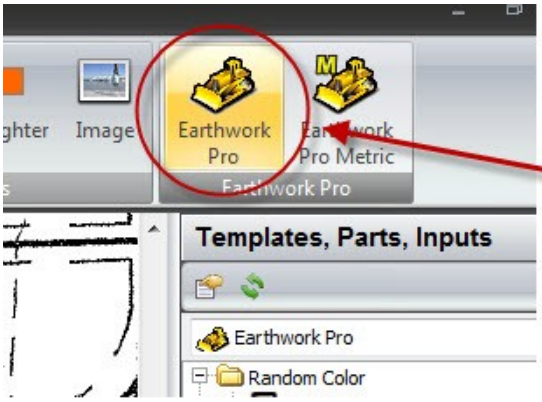
All of the existing and proposed areas will now be selected.

They will all be highlighted in red and you will see all of the points.

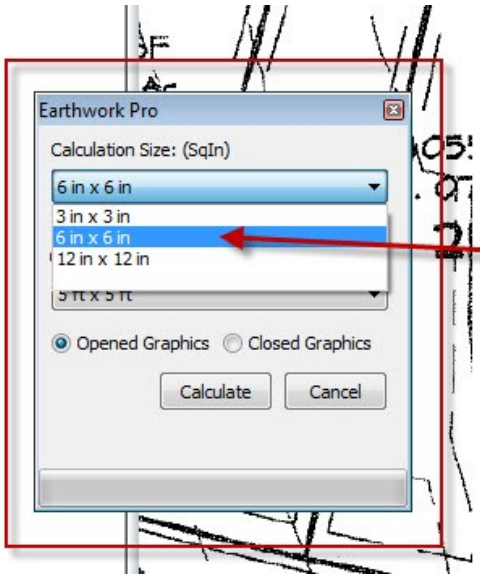
It is important that ALL of the areas are selected. Anything not included in the selection will not be analyzed.



Note: If other digitized items on the same page are also selected it will not affect the Earthwork Pro calculations, however it is recommended that those other items be hidden and not selected.



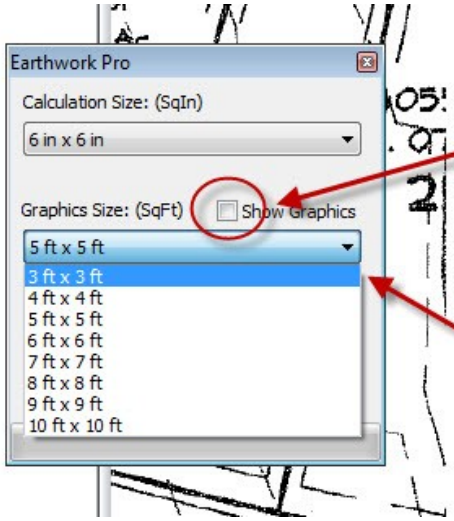
Click the Earthwork Pro button on the toolbar to open the plugin.



Earthwork Pro will open.

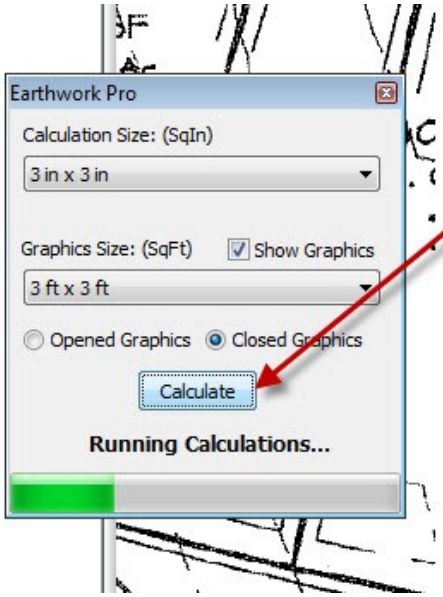
You can set your calculation size from 3x3 6x6 or 12x12 square inches.

This is the actual size of area that will be analyzed on each calculation.


Earthwork Pro
Calculation Size: (SqIn)
6 in x 6 in
Graphics Size: (SqFt)
Show Graphics
5 ft x 5 ft
3 ft x 3 ft
4 ft x 4 ft
5 ft x 5 ft
6 ft x 6 ft
7 ft x 7 ft
8 ft x 8 ft
9 ft x 9 ft
10 ft x 10 ft

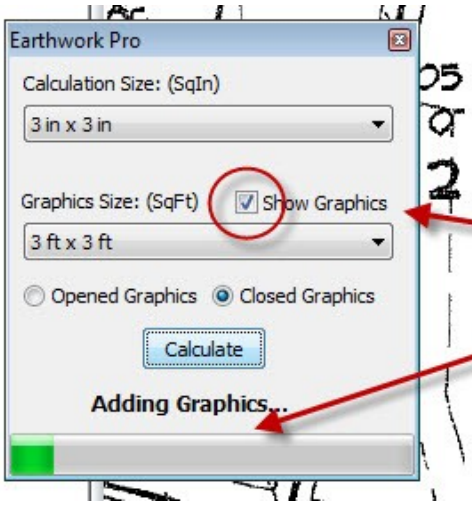
You can also select to show the graphics and choose the size of the graphics.

Note: The graphics size DOES NOT affect the calculations. PlanSwift requires way too much random access memory or RAM to do a smaller grid than 3ft x 3ft. This is the smallest option for the graphics.

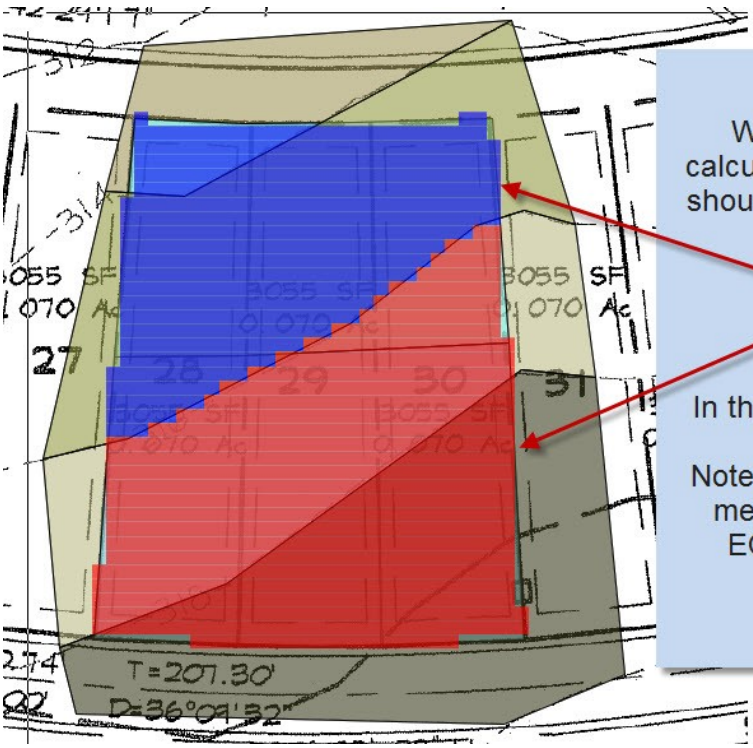


Click the Calculate button to begin running the calculations.

In this example the calculations are be analyzed on a 3in x 3in grid and the graphics will be added on a 3ft x 3ft grid.



If you checked the box to Show Graphics it will also add the graphics and give the progress.



When Earthwork Pro has finished calculating and adding the graphics you should see a blue and red shaded area.

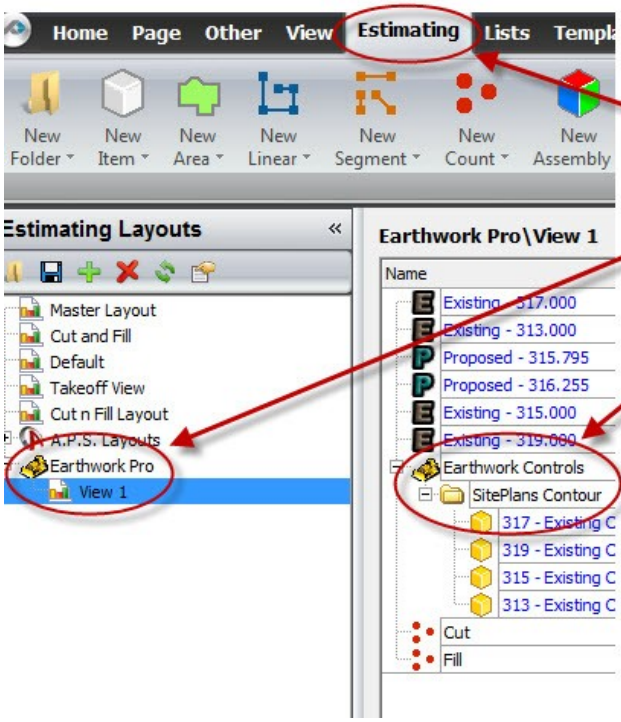
The blue is the areas for fills.

The red is the areas for cuts.

In this example we used a 3ft x 3ft grid.

Note: Any areas not shaded red or blue mean that the existing elevation was EQUAL to the proposed elevation.

You can also turn off all the existing and proposed areas to show just the graphics for the cuts and fills only.



To view the calculations simply go to the Estimating tab.

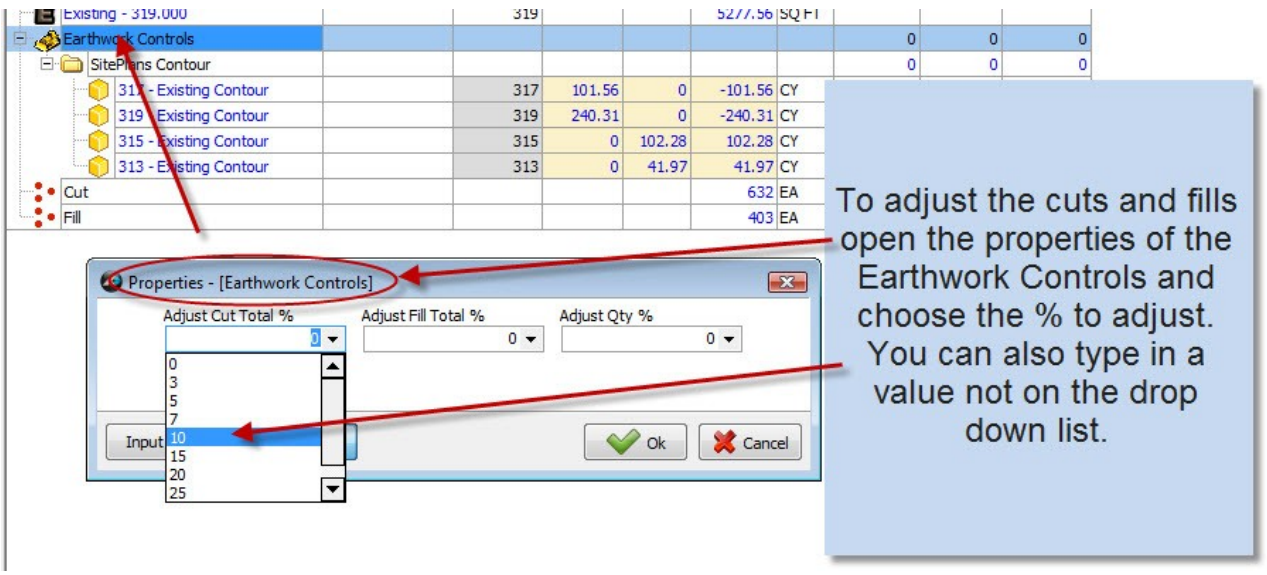
Click on the Earthwork Pro layouts.

You will need to expand the Earthwork Controls and also the folder below that. (the folder will be named the same as the page you did the takeoffs on.)

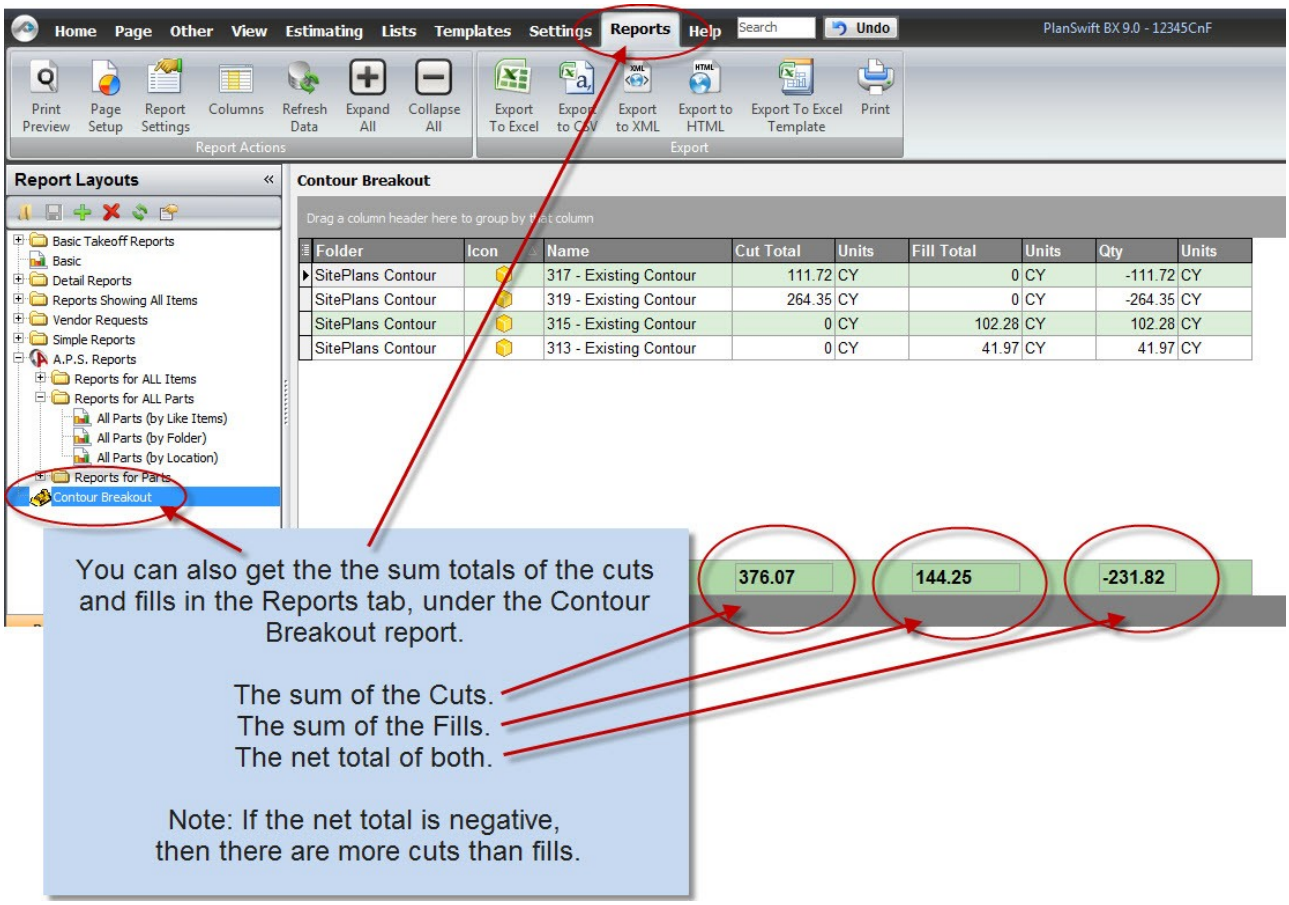
Each Existing Contour will be listed with its cuts and fills.

Name	Description	Elevation	Cut Total	Fill Total	Qty	Units	Adjust C...	Adjust F...	Adjust Q...
Existing - 317.000		317			4296.32	SQ FT			
Existing - 313.000		313			1536.06	SQ FT			
Proposed - 315.795		315.795			3913.02	SQ FT			
Proposed - 316.255		316.255			5425.16	SQ FT			
Existing - 315.000		315			4520.52	SQ FT			
Existing - 319.000		319			5277.56	SQ FT			
Earthwork Controls							0	0	0
SitePlans Contour							0	0	0
317 - Existing Contour		317	101.56	0	-101.56	CY	0	0	0
319 - Existing Contour		319	240.31	0	-240.31	CY	0	0	0
315 - Existing Contour		315	0	102.28	102.28	CY	0	0	0
313 - Existing Contour		313	0	41.97	41.97	CY	0	0	0
Cut					632	EA			
Fill					403	EA			

This layout will give a summary of the cut totals, fill totals and the Qty total (the net total). You can also adjust the cuts and fills with a percentage.



To adjust the cuts and fills open the properties of the Earthwork Controls and choose the % to adjust. You can also type in a value not on the drop down list.


Home
Page
Other
View
Estimating
Lists
Templates
Settings
Reports
Help
Search
Undo
PlanSwift BX 9.0 - 12345CnF
Print Preview
Page Setup
Report Settings
Columns
Refresh Data
Expand All
Collapse All
Report Actions
Export To Excel
Export to CSV
Export to XML
Export to HTML
Export To Excel Template
Print
Export
Report Layouts
Basic Takeoff Reports
Basic
Detail Reports
Reports Showing All Items
Vendor Requests
Simple Reports
A.P.S. Reports
Reports for ALL Items
Reports for ALL Parts
All Parts (by Like Items)
All Parts (by Folder)
All Parts (by Location)
Reports for Parts
Contour Breakout
Contour Breakout
Drag a column header here to group by that column
Folder | Icon | Name | Cut Total | Units | Fill Total | Units | Qty | Units
SitePlans Contour | 317 - Existing Contour | 111.72 | CY | 0 | CY | -111.72 | CY
SitePlans Contour | 319 - Existing Contour | 264.35 | CY | 0 | CY | -264.35 | CY
SitePlans Contour | 315 - Existing Contour | 0 | CY | 102.28 | CY | 102.28 | CY
SitePlans Contour | 313 - Existing Contour | 0 | CY | 41.97 | CY | 41.97 | CY
376.07
144.25
-231.82
You can also get the the sum totals of the cuts and fills in the Reports tab, under the Contour Breakout report.
The sum of the Cuts.
The sum of the Fills.
The net total of both.
Note: If the net total is negative, then there are more cuts than fills.

ACS - Advanced Costing Suite

Support pages for the ACS - Advanced Costing Suite

ACS - Installation Instructions

Installation:

1. Open PlanSwift if it is not already open.
2. Run your auyomatic updates to ensure you have the latest version of PlanSwift.
3. After purchasing the plugin download the installer from the PlanSwift9 Plugin Sidebar.
4. When prompted press the 'Save' button. .
5. Once you run the installer the installation will just take a minute to complete.
6. After PlanSwift opens for the first time it is recommended that you restart PlanSwift once more to fully refresh the installed types.

To Uninstall:

1. Open PlanSwift if it is not already open.
2. Go to the settings and select 'Interface'.
3. Select 'Show Types in Templates Tab'.
4. Go to the 'Templates' tab and select the 'Types' tab.
5. Select 'Level 21 Custom Types' and Delete it.
6. Goto Lists and select 'Level21 custom Lists' and Delete it.
7. Goto Estimating and select 'Level21 custom Views' and Delete it.
8. Goto Reports and select 'Level 21 Custom Reports' and Delete it.
9. Goto Settings and select Plugin Manager and Delete the R.I.N.G plugin.
10. Restart PlanSwift.

ACS - User Guide

This easy to follow guide will give you all of the information you will need to use the ACS plugin for PlanSwift.

After the installation has completed it is a good idea to restart PlanSwift if you have not already. This will ensure that all of the new types have been refreshed in the system. Now you are ready to begin using the ACS plugin. If you are familliar with job costing this will be very familiar to you.

Creating new parts and assemblies using the new ACS defaults

Open the Templates tab in PlanSwift and select the Level21 sample tab. In here you will find some examples of Digitizer Templates, Parts that include the 5 cost classifications of Material, Labor, Equipment, Subcontract and Other. There are no specific calculations to these items they are there for reference. As you look through them you will notice that they have the same core properties for costing but will have extra properties based on whatever classification they are. Next you will see the Assembly designated by the multi-colored cube. The same parts have been applied to the assembly. Assemblies in ACS will total the sub-items that are attached to it giving you a total assembly price as well as the unit price.

To create a new Item simply press the New From Type button (the one with the hammer icon). From the window that opens expand the Level21 - Custom Types icon. Here you will see the different types that are supplied with the plugin. Expanding the Item Types will give you the 5 options for Material, Labor, Equipment, Subcontract and Other. Select the item you want to create and press OK. A new properties window should have opened for the item you selected. Now all you need to do is press the advanced button to start editing the item to suit your needs. As the end user you just need to build the necessary calculation for the QTY and enter your cost for the item. You can add additional properties to the item to suit your needs. Thats it!

Note: Please note that if you have some templates already created in PlanSwift prior to installing ACS they will inherit the properties of the ACS addin if they are of the same types. This will also apply to Area, Linear, Segment, and Count items.

If you want to add additional defaults or some other customization email us for a price quote on a custom implementation. CustomACS@Level21tech.com

Editing Drop down Lists

All of the menu drop down lists have been created in the Lists Tab of PlanSwift. This allows for simple editing of what ever you want to include. Just open the Level21 Custom Lists and select the list you want to edit. The new items will be available immediately in the drop down menus.

Job Setup / Costing

For the most part the job setup is pretty self explanatory. I will discuss how costing works. On the costing screen you can enter a percentage number (Just enter a number and not the % sign) for each of the five cost categories. Your Markup percentage is added to the total cost of the item including the Burden and Overhead. Burden and Overhead are figured independently of one another and are added to the cost you give the item. If you do not use Burden or Overheads just un-check the boxes. Please note that you can set an individual part (material, Labor,Equipment, subcontract, other) item Markup to override this setting in the properties of the item applied to the job.

On the tax screen you can add up to two sales tax rates, again just enter a number and not the % sign. You can also select the categories to calculate tax on by checking the appropriate boxes. Please note that you can set an individual part (material, Labor,Equipment, subcontract, other) item to tax exempt to override this setting in the properties of the item applied to the job.

Note: There are also properties on the individual items to add a fixed burden and / or a fixed overhead cost to that item. i.e. an equipment item may have a calculation for an hourly production rate however there may be a delivery cost involved so the item may have a cost each of $50 per hour + a delivery fee in the fixed Overhead or burden of $200 thus adding the $200 to the calculated price total before Markup is applied.

Typically:

Burden - Applied to materials it represents the overhead that is directly related to handling materials (Purchasing, Inspection, stocking etc)
Overhead - Labor that is not directly involved in producing product (Design, Marketing, Accounting, HR, Facilities etc).

Job Setup / Report Options

When you check the boxes on this screen you are enabling the totals for the parent items to be calculated. A takeoff cost will display the cost per takeoff unit based on the items that have been applied thus resulting in a price per LF, SQFT or EA. The same applies to the Assembly method except it totals on the assembly.

Estimating Options

ACS now has custom folders in the Estimating tab. All folders now have an option to create a Typical Takeoff simply by checking the Typical Takeoff check box and entering the quantity to multiply by. This will apply the multiplier to all items within that folder. There are also ACS Option folders to assist you in organizing the takeoff. They function similarly to folders with typical takeoff options but they also give you a visual reference when looking at your data.

- Unit - for unit types in Hotels or appartments
- Base - for the base takeoff, ideal for tract builders
- Options - a little something for everyone

Look for new reports comming soon to enhance these features even more.

Reports

Reports are self explanatory we have created 10 useful reports. you are free to modify these, create your own, or contact us if you are looking for something custom.

UDA Export

The UDA Export function allows you to effortlessly export all of your PlanSwift data (Material, Equipment, Labor, SubContract, and Other items) in to a format that is 100% compatible with the UDA Construc tion Suite. By Default the export uses the Division, Sub Division and item name as the import code required from UDA. These are editable to use other fields within PlanSwift by going to the settings and selecting the UDA Export Settings button on the toolbar. Map the appropriate UDA category settings to one of the PlanSwift fielda in the dropdown list.

To export your data go to the Reports Tab and select the UDA Export Button on the tool bar and perss Export Now. The information is exported into the preformatted MS Excel file for you to save and import into UDA Construction Suite using the 'Import from Etakeoff' option.

Open Job Dialog

Customize the open job dialog window to suit your needs. Simply click on the Open button from the Home tab. Click on the Columns butto and press the green plus symbol to add a new column. Enter any of the following property names to customize your window.

- Name
- Description
- Last Modified
- Notes
- Bid Due Date
- Primary Estimator
- Status
- Contact
- Email
- Phone
- City
- State

ACS - Advanced Costing Suite

The Advanced Costing Suite is an addin to the PlanSwift Takeoff and Estimating software. ACS is for the user who needs a costing solution based on parts and assemblies without having to create it from nothing. The addin installs pre-defined types into the PlanSwift software that sets up an entire costing system within the application in a matter of a few minutes. This alone **greatly simplifies** building your parts and assemblies. Users can then start building their library of items with ease, in fact all the end user needs to do is build their own calculation to quantify the items based on the formulas that work for them and enter a base cost for the item. ***(Note: we do not provide cost data)***

With ACS you are supplied with a robust project setup dialog where you can enter your project defaults for contact info, tax rates and options, global markups, global burden rates, and global overhead rates all based on the item types. All of your library items will inherit their respective global parameters while still giving the user the flexibility to override the default and set a custom rate. ACS will also give you your total per unit cost and pricing based upon the items that are applied to the digitized takeoff.

ACS gives you enhanced reporting complete with costs, profits and an abundance of sorting possibilities . We do not build your assemblies and parts we give you the tools to easily build what you need to give you a custom your system in a very short time. **In fact it will save you 120** or more hours of setup time**.

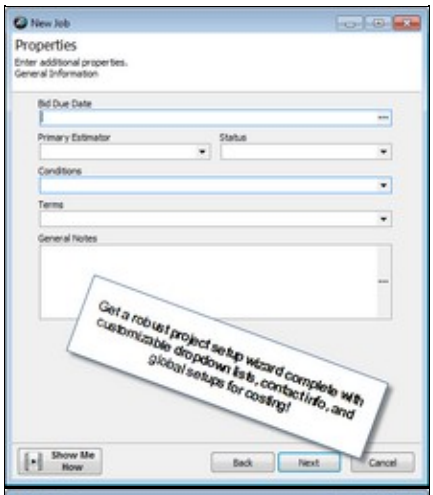
Features & Benefits:

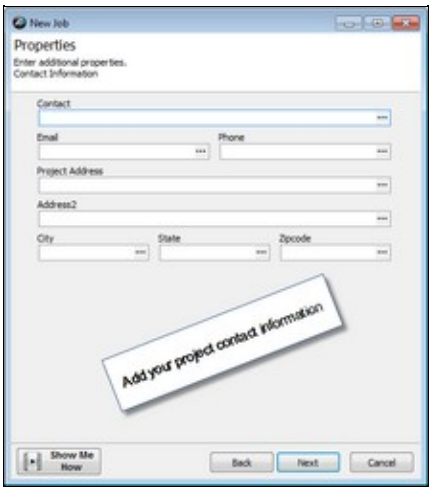
- Quick hassle free installation saves you countless hours of setup
- All back end costing calculations pre-installed
- Intuitive project setup menus
- Global variables for taxes, markup, burden, and overhead (Separate global markups, burdens, and overheads based on the cost type)
- All items have options for additional fixed overhead and burden costs (Great for additional fixed costs such as mobilization costs)
- All Item markups can be individually specified (easily override the global settings)
- Selectable labor wage rates (open and union shops)
- Optional Labor fuel stipend (Easilly include fuel stipends for labor a necessity with todays rising fuel costs.)
- Project fields for due dates, estimators, notes, contact information, Terms and conditions (add relavent information to the job and pull that information into reports)
- Dual tax rates for state, county or city taxes (Need to include tax? A simple check box will add tax to your jobs when required.)
- All Items have options to be tax exempt
- Organizational options for Division, Phase, Location and Zones (Set the option ao a parent and all childre will inherit the value yet still allow you to edit individual items as needed)
- Dynamic takeoff items that convert sub items into unit costs for condensed reporting (report $ per unit)
- Automatic Item numbering utilizing ACS-R.I.N.G (Generate unique item numbers for your parts with the click of a button to use with our Cost updater)
- Job cost updater **Beta**
- Includes all Estimating Views, Lists, and 12 custom reports
- Lists - User editable lists including the Standard 16 CSI Divisions and Sub-divisions
- New - Typical Takeoffs
- New - Deduction Digitizers
- New - Folder Options
- New - UDA Export

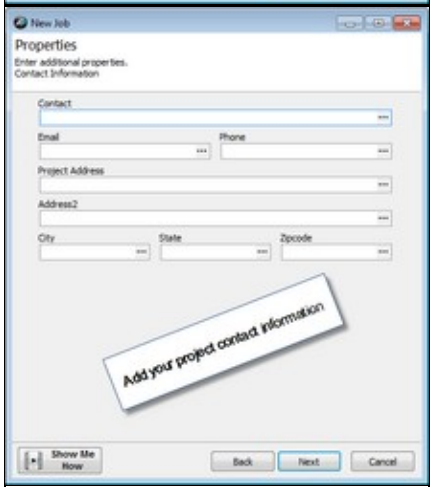
- New - Last Modified timestamp on job
- **New - Added change Order # and Change Order Report** !!

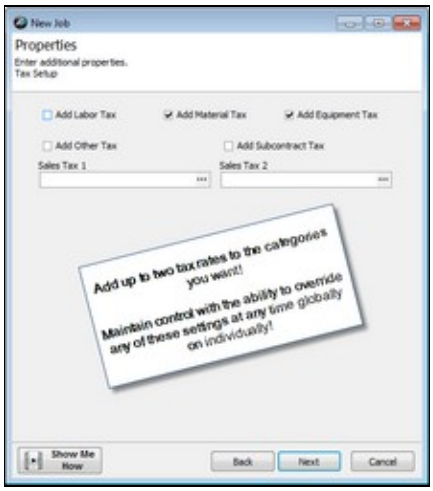
ACS Includes everything listed above for the low price of $249.00!

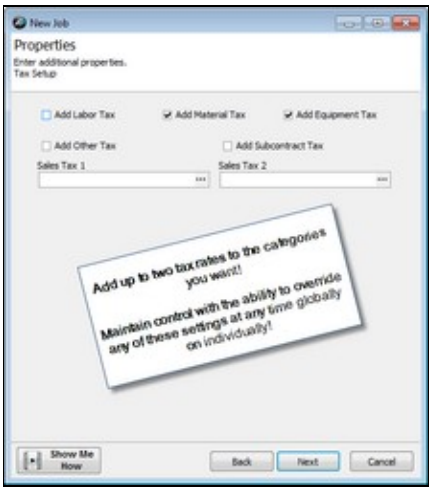
Click the screen shots for larger image!

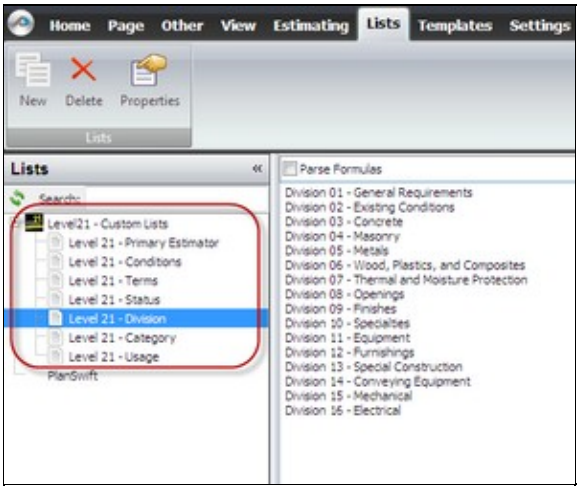


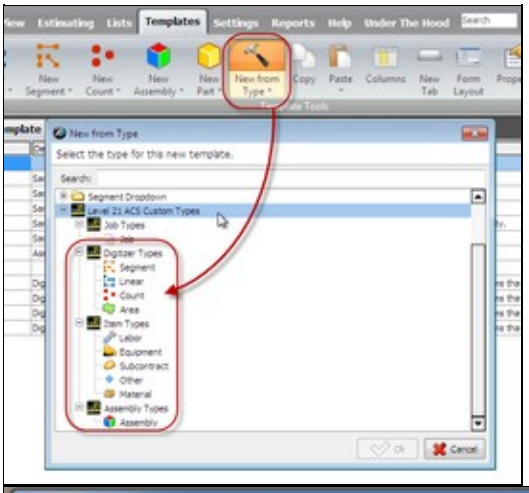









Home
Page
Other
View
Estimating
Lists
Templates
Settings
New
Delete
Properties
Lists
Lists
Parse Formulas
Level21 - Custom Lists
Level 21 - Primary Estimator
Level 21 - Conditions
Level 21 - Terms
Level 21 - Status
Level 21 - Division
Level 21 - Category
Level 21 - Usage
PlanSwift
Division 01 - General Requirements
Division 02 - Existing Conditions
Division 03 - Concrete
Division 04 - Masonry
Division 05 - Metals
Division 06 - Wood, Plastics, and Composites
Division 07 - Thermal and Moisture Protection
Division 08 - Openings
Division 09 - Finishes
Division 10 - Specialties
Division 11 - Equipment
Division 12 - Furnishings
Division 13 - Special Construction
Division 14 - Conveying Equipment
Division 15 - Mechanical
Division 16 - Electrical


Templates
New from Type
Select the type for this new template.
Segment Dropdown
Level 21 ACS Custom Types
Job Types
Digitizer Types
Segment
Linear
Count
Area
Item Types
Labor
Equipment
Subcontract
Other
Material
Assembly Types
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OK
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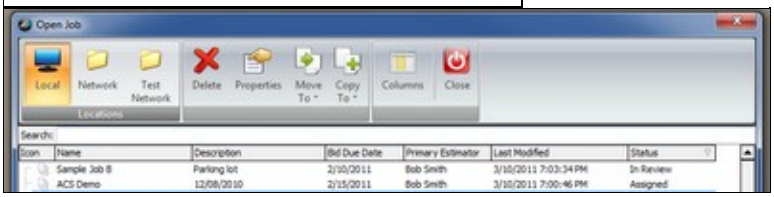
Open Job
Local
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Test Network
Delete
Properties
Move To
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Columns
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Locations
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Icon
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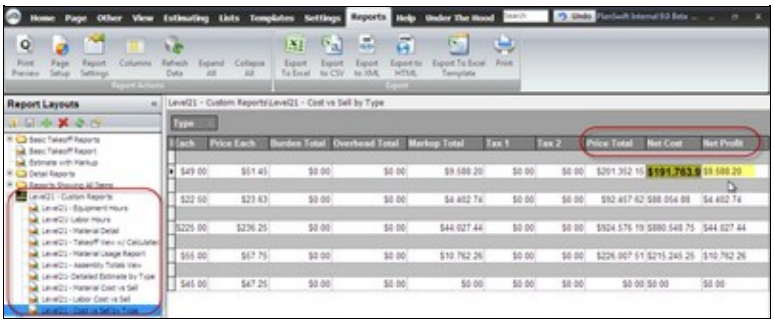
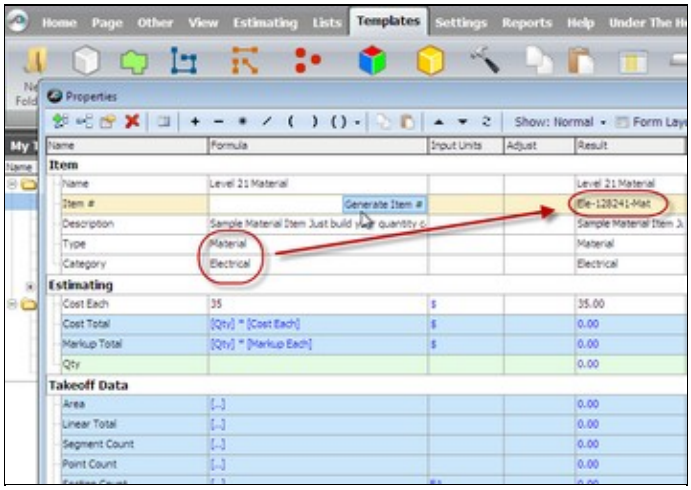
Bid Due Date
Primary Estimator
Last Modified
Status
Sample Job B
Parking lot
2/10/2011
Bob Smith
3/10/2011 7:03:34 PM
In Review
ACS Demo
12/08/2010
2/15/2011
Bob Smith
3/10/2011 7:00:46 PM
Assigned


Report Layouts
Each
Price Each
Burden Total
Overhead Total
Markup Total
Tax 1
Tax 2
Price Total
Net Cost
Net Profit


Home
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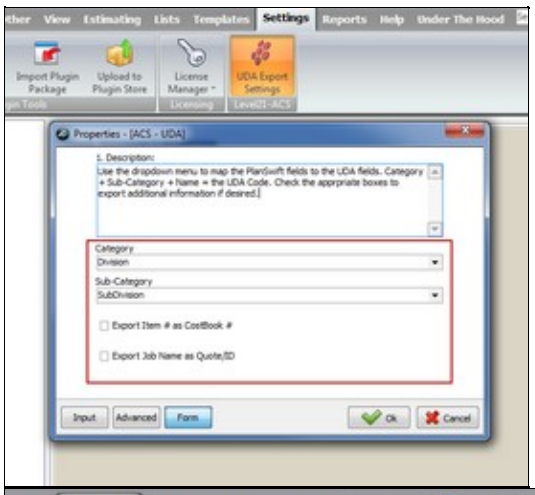
Result
Item
Name
Level 21 Material
Item #
Generate Item #
Description
Sample Material Item Just build your quantity
Type
Material
Category
Electrical
Estimating
Cost Each
35
Cost Total
[Qty] * [Cost Each]
Markup Total
[Qty] * [Markup Each]
Qty
Takeoff Data
Area
Linear Total
Segment Count
Point Count


Settings
Reports
Help
Under The Hood
Import Plugin Package
Upload to Plugin Store
License Manager
UDA Export Settings
Licensing
Level21-ACS
Properties - [ACS - UDA]
1. Description:
Use the dropdown menu to map the PlanSwift fields to the UDA fields. Category + Sub-Category + Name = the UDA Code. Check the appropriate boxes to export additional information if desired.]
Category
Division
Sub-Category
SubDivision
Export Item # as CostBook #
Export Job Name as Quote/ID
Input
Advanced
Form
Ok
Cancel

Reports
Help
Under The Hood
Search
Undo
Export to CSV
Export to XML
Export to HTML
Export To Excel Template
Print
UDA Export
Export
Level21-ACS
Export to UDA
Export Now
Cancel
Description
Equipment
21 Equipment
Sample Item to H
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21 Equipment
Sample Item to H
87.28

Third Party Plugins

These Plugins are solely supported by the author of the plugin.

Accurate Landscape Plugin

Accurate Landscape Plugin allows the end user the ability to enter costs into the Input window, the estimating report window, or on the actual template itself. It covers Landscape Estimating and basic Hardscapes. The Landscaping section had an extensive Data base built into the Description window. So when the user opens the tree or shrub count property box for estimating they can select a botanical name without having to spell it out completely. The irrigation Template also has a data base of sprinklers, valves and pipe.

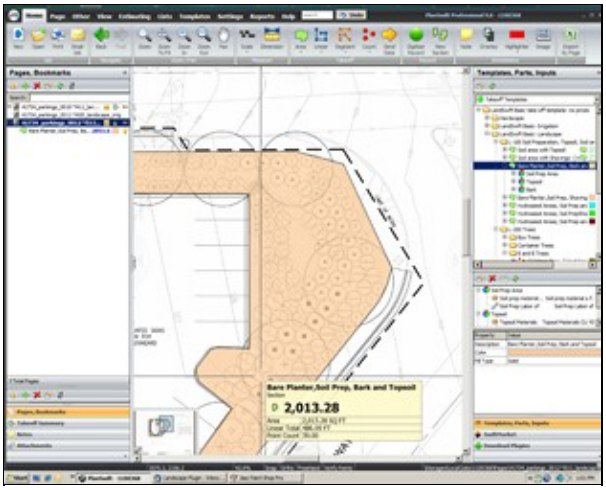
The reports are driven by cost codes , divisions and Phases.

- Divisions Irrigation, Landscape and Hardscape.
- Phases L-100 to L-800 for Landscaping
- Cost Codes are broken down for Labor and Materials

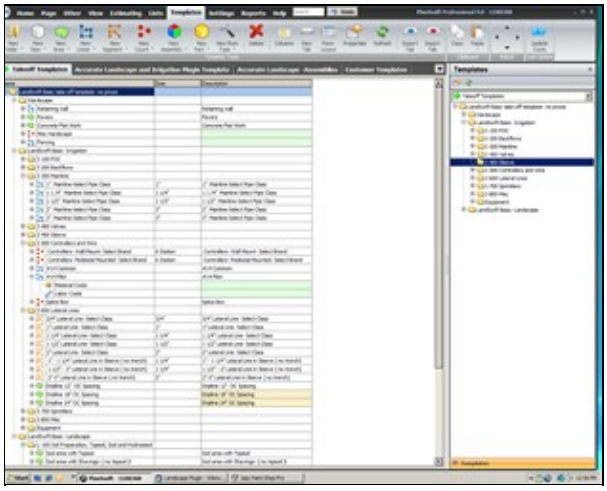
This will allow for the end user to break out Labor by cost codes to allow for budgeting and timecard inputs.

Watch Videos

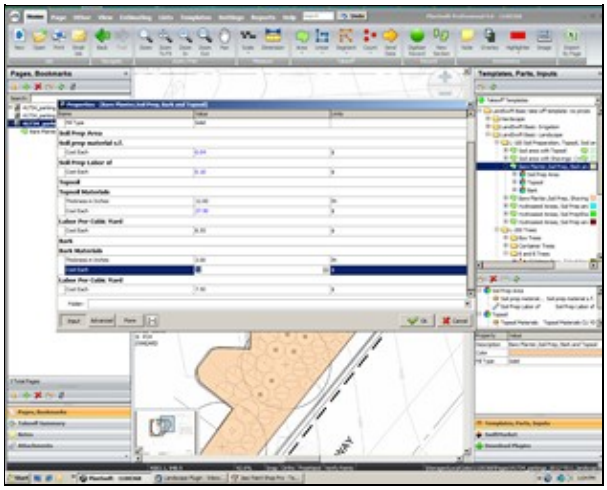
Take Off Screenshot :
This is a Screenshot of the take off window, these folders are broken down into Landscape, Hardscape and Irrigation



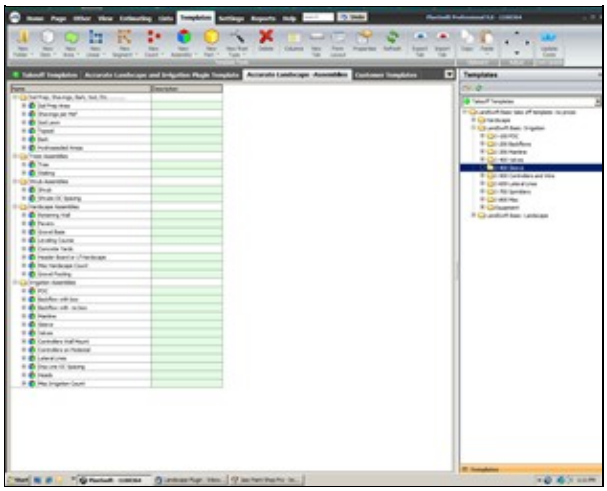
Takeoff Template Screenshot:
This is the basic template the end user can pull his estimates from. They of course can enter standard rates here on each item or adjust the labor codes. As you can see I have use the assemblies in each section. The L-100 type codes are my coding for each phase of the Landscape job. These are in order of Construction. I have provided the shrubs On Center spacing for either, a drop and drag take off, or as a separate Item. I have also provided several different soil prep items to allow the user the option of creating their own soil prep or using one the provided ones. You can see the assemblies tab (separate Screen shot) as well as a place to store the backup Templates for the Landscape Package.



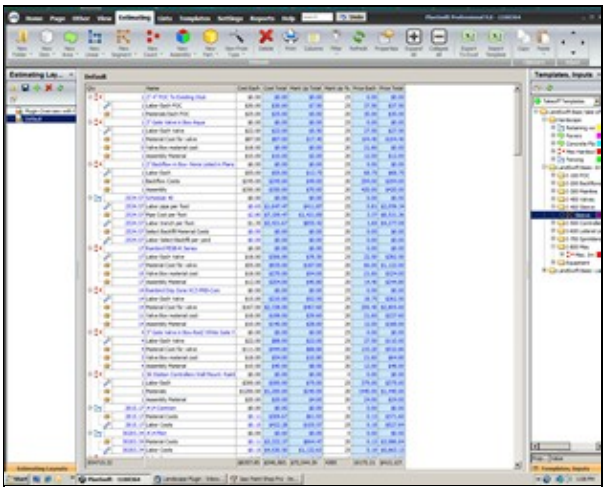
Input Screenshot:
This a screenshot of the input window, where the user can enter costs or data. Example â ¦ For Mainline pipe there is a box for; description (database), Pipe size (database), Pipe Costs, Pipe Labor per feet (not including trenching), Trenching and backfill costs (labor), Selected backfill description, Backfill costs, Trench depth, and width, and Labor per yard to place Gravel. These can also be set up in the template window as well as the estimating screen.



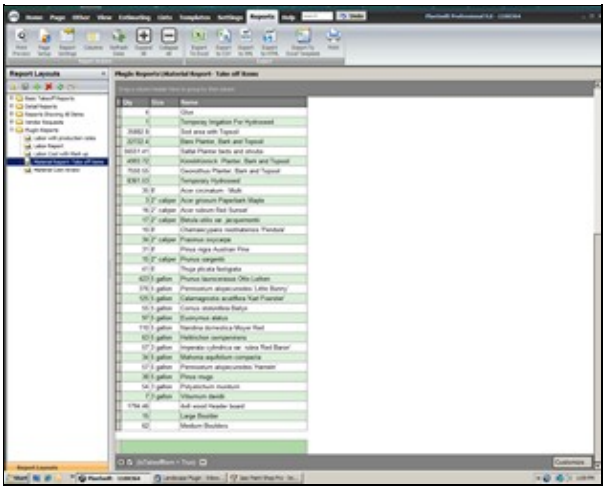
Assemblies Screenshot:
These are all of the assemblies provided with the Plugin. They are broken down into several different catagories.



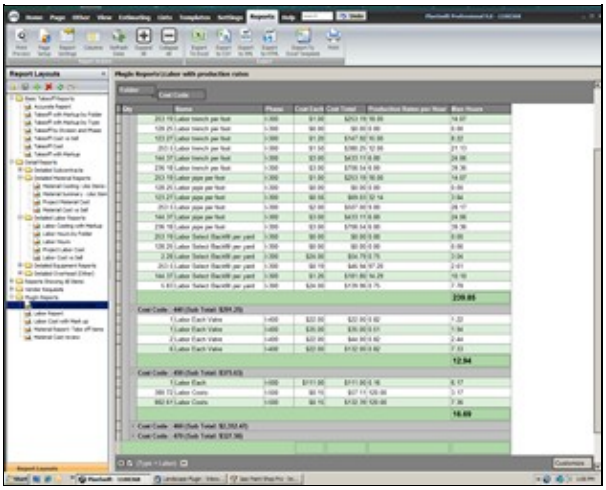
Estimate Report Expanded view Screenshot:
Basic report for the user along with totals as well as a place to input costs.



Materials Quote Report Screenshot:
Broken down by Division and take off items.



Labor report with man days and production rates:
The user can adjust the hour rates in the columns window. These breakdowns can be used for job tracking and budgeting per phase. There also a couple of other labor and material costs report totals as well.



PlanSwift- Accurate Landscape-plugin tutorial- Soil Prep

PlanSwift - Accurate Landscape Plugin - Sleeves, Main and Laterals

PlanSwift Accurate Landscape Plugin tutorial- Pricing

PlanSwift- Accurate Landscape Plugin- Tree tutorial

PlanSwift - Accurate Landscape Plugin- Cost codes and reports explained

Support Contact Information:

Author: **Accurate Landscape Estimating**
Contact Name: **Todd Kaberline**
Email: **ccltodd@yahoo.com**
Phone: **541-646-0975**

Area Pro

Items Included:

- Items
- Area Pro
- Page Items
- Area Pro Section

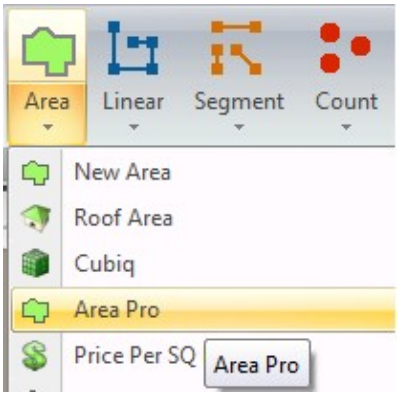
Functionality
Area Pro Plug-in will install a new digitizer item, enables you to receive calculated information for Area Itemâ s with Subtraction about:

- Total Openings Area
- Total Openings Linear Total
- Gross Area
- Gross Linear Total
- Gross Volume

Installation

1. Open PlanSwift if it is not already open.
2. Go to "Download Plugins" Sidebar and make the necessary steps for downloading the plugin.
3. When download is finished choose â Openâ . This will process the installation.

After installation you will find "Area Pro" in your "Area" Button Drop-down list.



Uninstall

1. Open PlanSwift if it is not already open.
2. Go to the settings and select â Interfaceâ .
3. Select â Show Types in Templates Tabâ .
4. Go to the â Templatesâ tab and select the â Typesâ tab.
5. Open â Area Dropdownâ Folder
6. Find Area Pro and delete it.
7. Go to Settings and select Plugin Manager and Delete the Area Pro Plugin.

After removal of license for Area Pro you will not be able to edit ANY of already created Items with Type"Area Proâ .

Caution: Use this type without adding digitizer sub items.

Support Contact information:

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Contact Name: Bilyan Baldzhiev
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Phone: +359878983854

General Q & A

Rename Job - Hi, I want to rename a job in Planswift 9...how do I do this? Or, if I want to update a current job but keep the original so I save the changes as a revision how do I do this?

Thank you for your question.

Question:

Hi, I want to rename a job in Planswift 9...how do I do this? Or, if I want to update a current job but keep the original so I save the changes as a revision how do I do this?

Answer:

Yes you can do both of these functions. For more information on how to do this please check out the articles under Job Management - http://www.planswift.com/kb/216/
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why is it asking for activation again - why am i being asked to activate again.... i have a bid due and i cannot access....

Question:

Why am I being asked to activate again?

Answer:

PlanSwift will ask you to reactivate every 120 days. Simply press the activate button when you see this message. If you are still unable to activate at that time please make note of the message that is displayed as for the reason it will not activate. You can check the answers to the activation messages here - http://www.planswift.com/kb/213/

What do i do if I forgot my PIN#?

Question:

What do i do if I forgot my PIN#?

Answer:

You can go here to retrieve your PIN - Resend PIN Information
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Mac BootCamp - Will system 9 work through Mac Bootcamp?

Question:

Will version 9 work through Mac Bootcamp?

Answer:

Yes, PlanSwift Professional 9 will run on a Mac using Bootcamp and Windows.

PlanSwift 9 'By the Tabs'

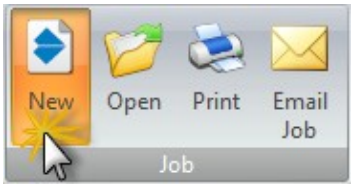
'By the Tabs' lets you easily navigate the help files by grouping the help documents based on the tab they are located in PlanSwift.

Home

New Set of Plans or New Job

The "New set of Plans" button is the starting point for creating a new job in PlanSwift. When you click this button the "New Job" window will open.

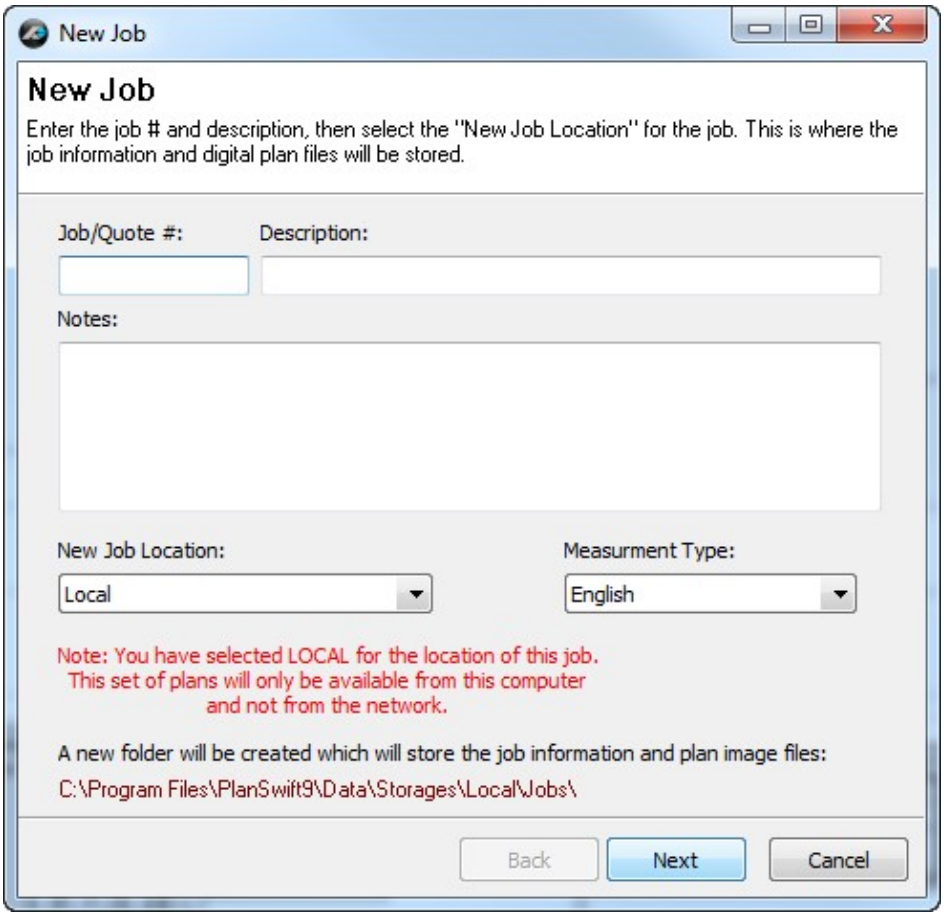
1. Select the 'New' button to begin.



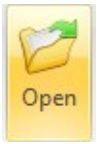
2. You may enter a Job or Quote number, Description, and Job Notes.

3. Select the storage location for the job data. The drop down list will show you all of your available locations. To create a new location see New Data Storage.

4. Click 'Next' to finish.


New Job
New Job
Enter the job # and description, then select the "New Job Location" for the job. This is where the job information and digital plan files will be stored.
Job/Quote #:
Description:
Notes:
New Job Location:
Local
Measurment Type:
English
Note: You have selected LOCAL for the location of this job.
This set of plans will only be available from this computer
and not from the network.
A new folder will be created which will store the job information and plan image files:
C:\Program Files\PlanSwift9\Data\Storages\Local\Jobs\
Back
Next
Cancel

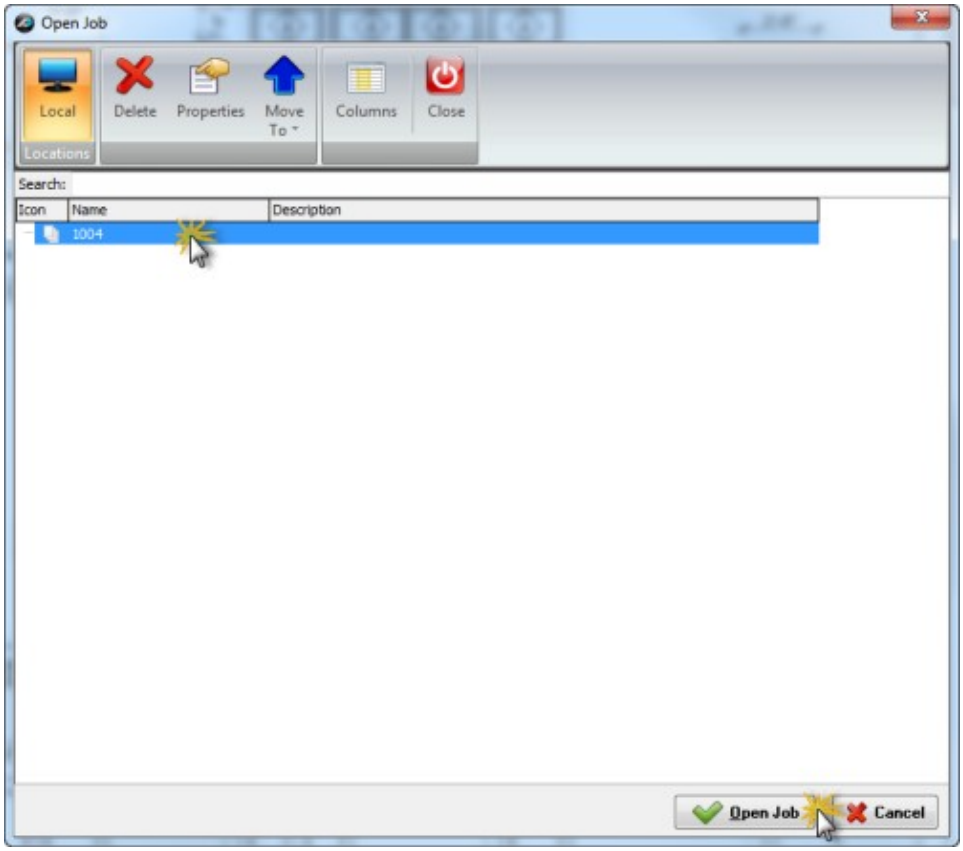
Open Existing Job



OPEN button allows you to open existing jobs.

1. To open an existing job select the 'Open' button.

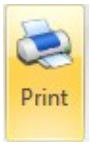
2. Select the location of the stored job.
3. Select the Job.
4. Click 'Open Job' to finish and open the job.



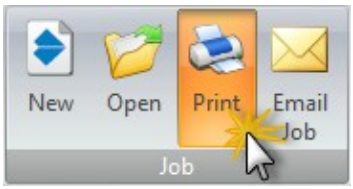
Please note: If you have upgraded from version 8 to version 9 your previous jobs will not be displayed. Please see this article for assistance on upgrading from 8 to 9

To watch a video about how to open an existing project, click here.

Print Plans and Images



1. Select the 'Print' button.



2. Select what information you want to print.

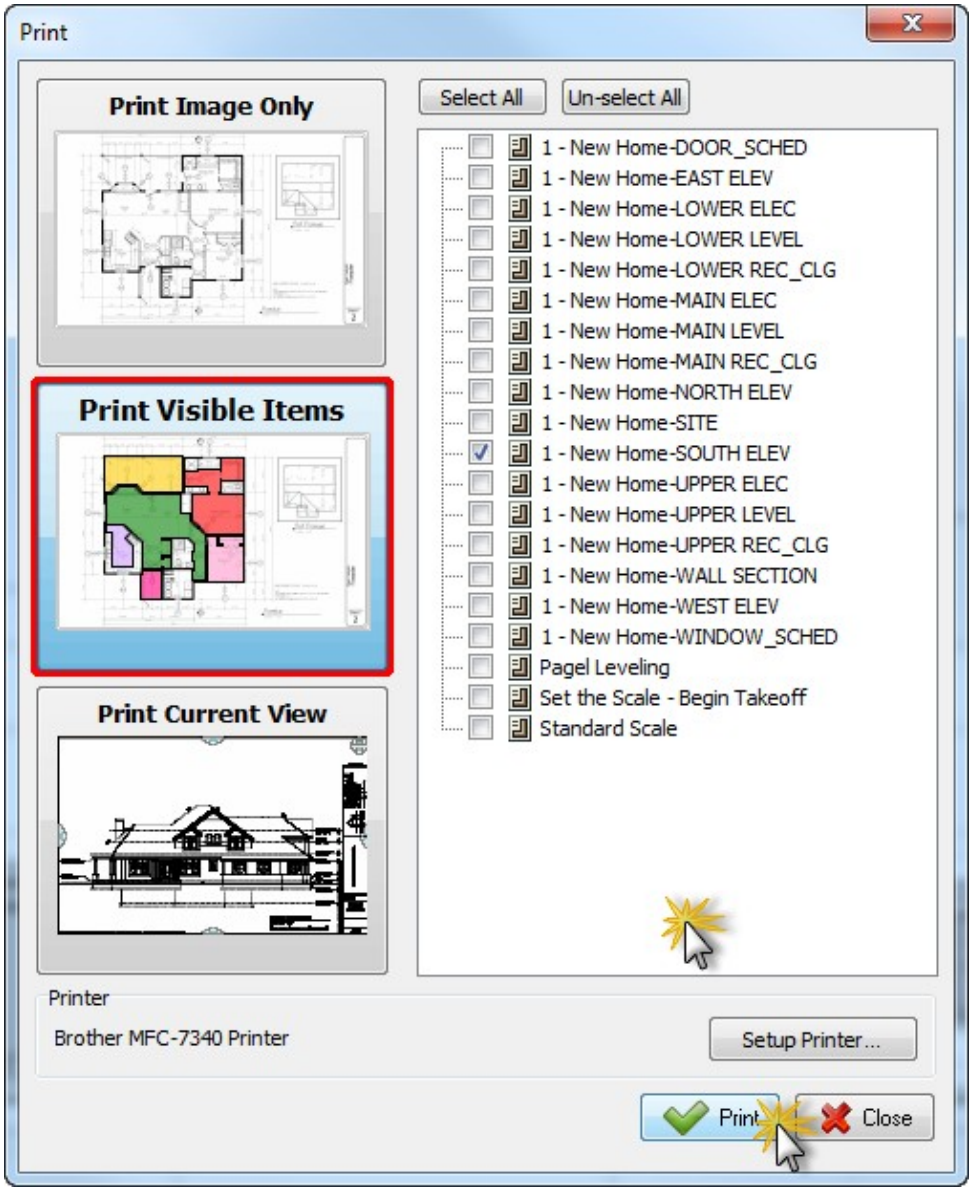
'Print Images Only'-Prints only the plan images **without** any color coding or other PlanSwift material.

'Print Visible Items'-Prints the plan images along **with** PlanSwift markups (This would include the Legend if the Legend is visible on the image for more info on legends click here).

'Print Current View'-Prints only the current page you are on as it appears on your screen.

3. With 'Print Image Only' and 'Print Visible Items' you can select any page image you want to print. Select the check box for each page you want to print, or 'Select All' for all the pages in the job.

4. Click 'Print' to start the printing process.



Note: Printing to scale is not possible unless the original electronic file is to scale and the selected print size corresponds to the original file.

Navigation Buttons

The navigation buttons allow you to move backwards and forward in the Pages you are working on.

'Back'-will move you to the page previous to the current page.

"Forward'-will move you to the next page.

The previous and next pages are not always the next in the list. PlanSwift goes by the pages you are viewing. This way you do not need to skip pages you are not using.

Zoom and Pan

'Zoom' - Allows you to select an area on your plans which will be zoom to fill your screen area.

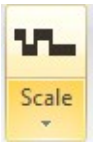
'Zoom to Fit' - Re-sizes the current plan to fit your screen desktop.

'Zoom In' - Zooms into the plan centering on the center of your desktop.

'Zoom Out' - Zooms out of the plan centering on the center of your desktop.

'Pan' - When select and Left clicking will allow you to drag your plan across your page.

Scaling a Plan Image

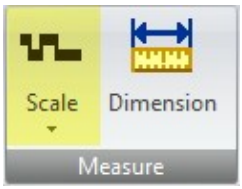


A plan image must be scaled before any digitizing can be done. If a plan image needs rotating or leveling, this needs to be done before the image is scaled. To scale a plan image:

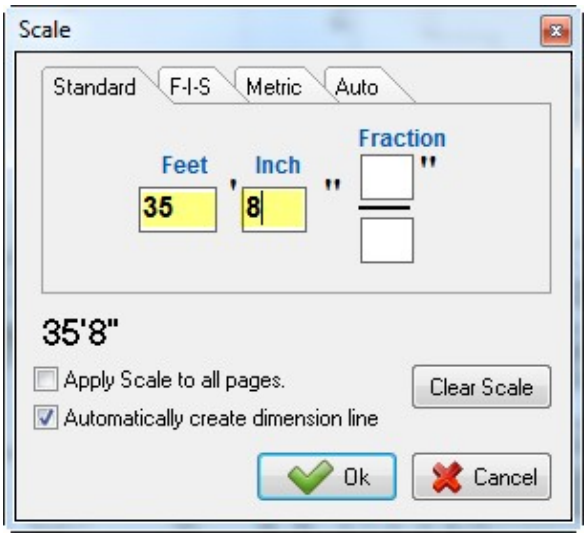
1. Click on the plan image to scale.

2. Select a dimension on the plan image to scale, preferably one over 20 ft long for best accuracy. It does not matter whether the dimension is horizontal or vertical but for best results doing both will help.

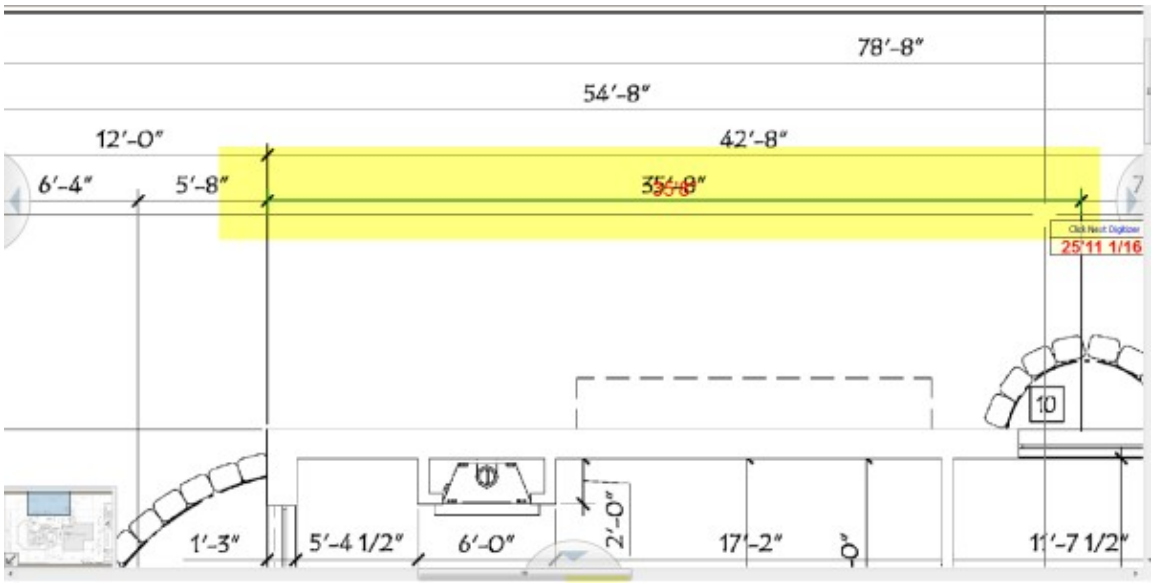
3. Select the 'Scale' button from the toolbar.



4. Enter the dimension into the Scale Dimension dialog and click the 'Ok" button.



5. Now click two points on the plan image that correspond to the dimension entered. You will want to carefully zoom and select the center of the dimension lines for best accuracy.



6. Once the image has been scaled, an arrow icon will appear next to the plan name in the pages window. The arrow will also show the direction that page has been scaled.

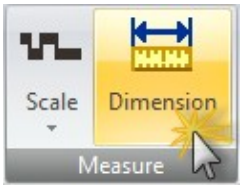
Alternately you can select from standard scaling options by selecting the lower portion of the button. However automatic setting of scale is only as accurate as the scanned in drawings. Make sure you double check several dimensions on each page to make sure the scale was set accurately.

Note: To re-scale a page simply repeat the above steps.
Note: A page can be scaled both horizontally and vertically for greatest accuracy. Just do the scale process once for a vertical measurement and once for a horizontal measurement.

Dimensions

Finding the dimension of any length in PlanSwift is easy.

1. Select the 'Dimension' button.



2. You can customize the line color and text color of your dimensions.

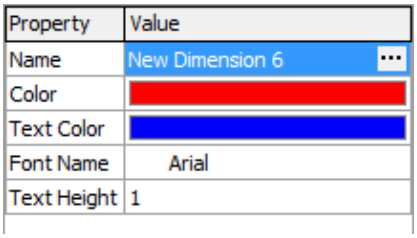
Name - Allow you to name the dimension to something more fitting.

Color - Select the color of the dimension line. By click on the colored area will bring up a color palate option box.

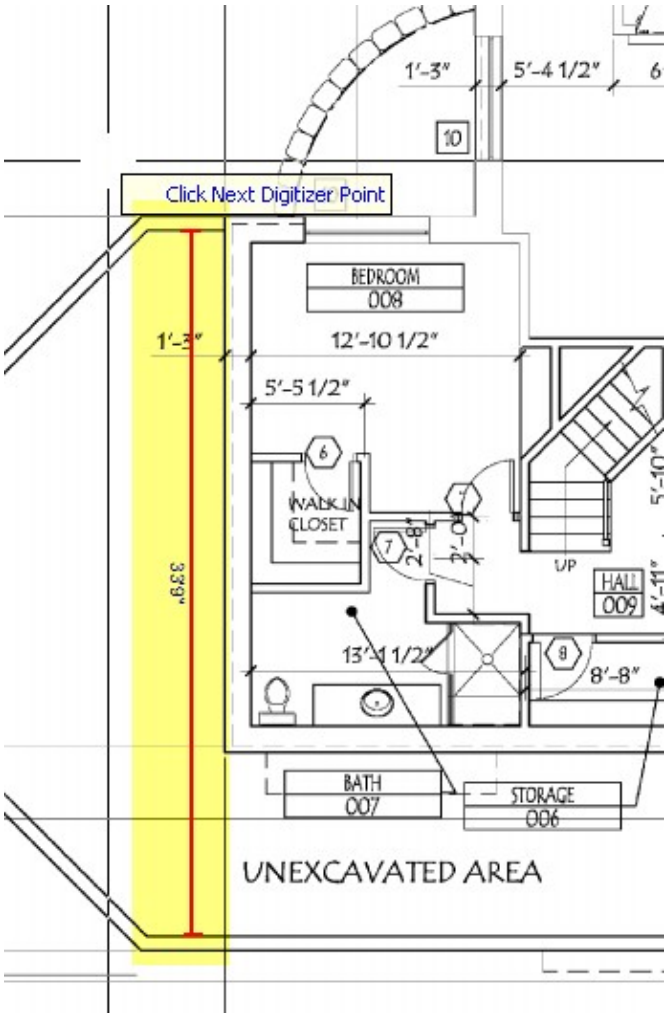
Text Color - Select the color of the dimension text.

Font Name - Allows you to change the font style for the text.

Text Height - Allows you to change the size of font used on the dimension line.



3. Select the stating point by left clicking your mouse, then move to the end point and left click again. This will give you the dimension. You can continue select dimensions with the same colors.



4. When you are done, press the 'Digitizer Record' button or Ctrl-C to stop the dimension system.

TIP: If you have have Ortho enabled and need to place a dimension on an angle off of one of the cardinal coordinates you can either turn off Ortho or hold the SHIFT key while placing the dimension line.

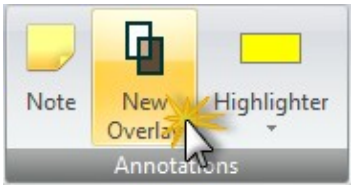
To remove a dimension, simply select the desired dimension by clicking with the cursor, and press delete on your keyboard.

To watch a video about how to add dimensions, click here.

Overlay Plans

The New Overlay tool allows you to place a separate page from your plans onto the page that you are currently viewing.

1. Select the 'New Overlay' button.

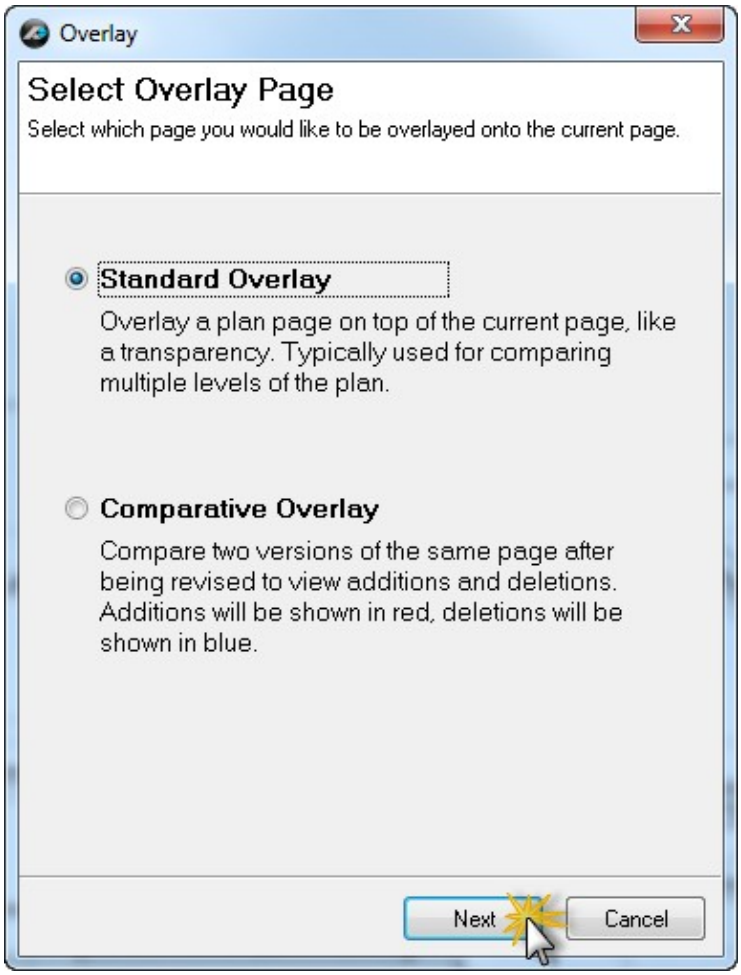


2. Select the type of overlay you want.

Standard Overlay - Places a second page on the current page you are viewing, usually for comparing the two images.

Comparative Overlay - Places a revised plan over the original plan. This will let you view revisions made in the plan. Additions are shown in red, and deletions are shown in blue.

3. Once you have made your selection, click the 'Next' button to continue.


Overlay
Select Overlay Page
Select which page you would like to be overlayed onto the current page.
Standard Overlay
Overlay a plan page on top of the current page, like a transparency. Typically used for comparing multiple levels of the plan.
Comparative Overlay
Compare two versions of the same page after being revised to view additions and deletions. Additions will be shown in red, deletions will be shown in blue.
Next
Cancel

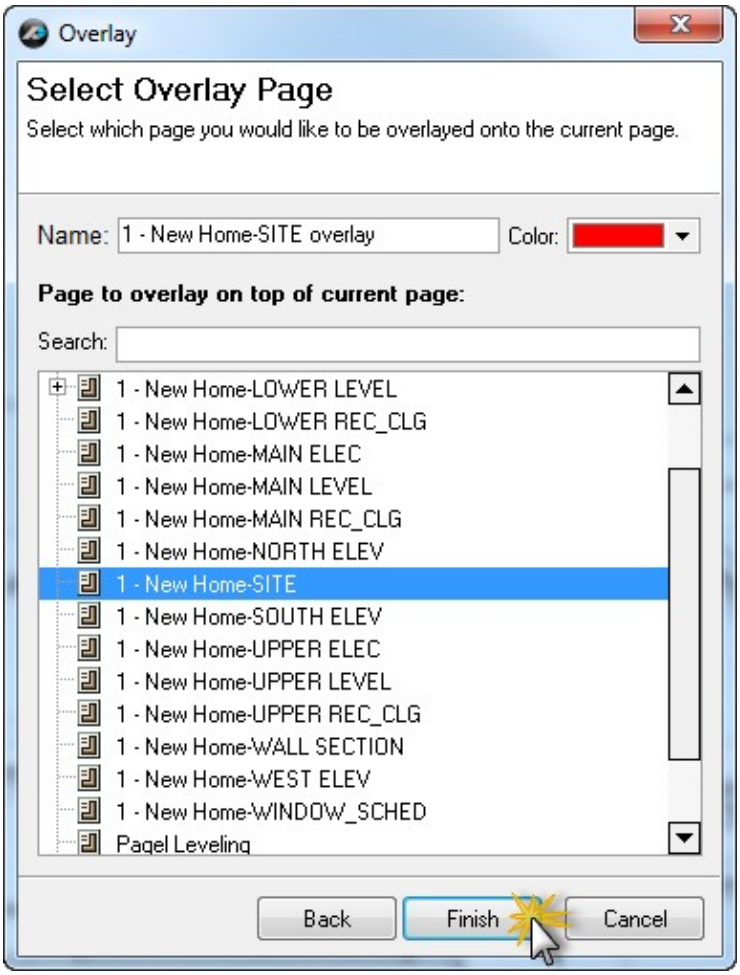
4. Select the page you want to overlay from the menu. You can select the page by clicking on it. Or you can search your job to help find the page.

You can also select what color you would like the overlay to be. PlanSwift automatically chooses a color for you, if you would like a different color, click on the box next to "Color".

5. Click 'Finish' to Continue.

This will place the overlay on top of your current page. A small window will open asking if you would like to align the overlay, if so, click "Yes". This lets you move the overlay to match your current image.

To turn the overlay on or off, simply click the light bulb icon next to its name.

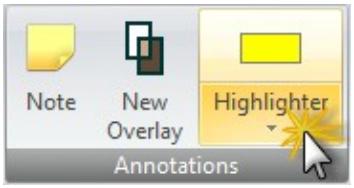

Overlay
Select Overlay Page
Select which page you would like to be overlayed onto the current page.
Name: 1 - New Home-SITE overlay
Color:
Page to overlay on top of current page:
Search:
1 - New Home-LOWER LEVEL
1 - New Home-LOWER REC_CLG
1 - New Home-MAIN ELEC
1 - New Home-MAIN LEVEL
1 - New Home-MAIN REC_CLG
1 - New Home-NORTH ELEV
1 - New Home-SITE
1 - New Home-SOUTH ELEV
1 - New Home-UPPER ELEC
1 - New Home-UPPER LEVEL
1 - New Home-UPPER REC_CLG
1 - New Home-WALL SECTION
1 - New Home-WEST ELEV
1 - New Home-WINDOW_SCHED
Pagel Leveling
Back
Finish
Cancel

To watch a video about adding overlays, click here.

Highlighter Tool

The Highlighter tool allows you to mark areas of your plans in color freehand.

1. Select the 'Highlighter' button. If you select the lower part of the button the color drop down menu will open to allow you to select the color you would like.

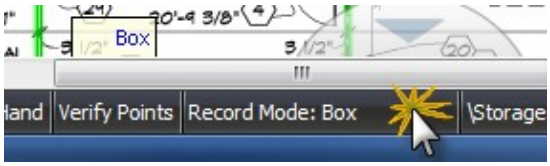


2. To draw straight lines pick the starting point left click your mouse then move to the end point or corner.

3. Right click again. You can make as many connecting lines as you want or can have multiple unconnected lines.

4. To draw freehand or curved paths simply hold the lift mouse button down as you move the cross hairs.

5. To draw boxes simply set the 'Record Mode' from 'Point to Point' to 'Box' at the bottom of the screen.



6. When you are done click the 'Digitizer Record' button or ESC to stop.

To watch the video about this topic, click here.

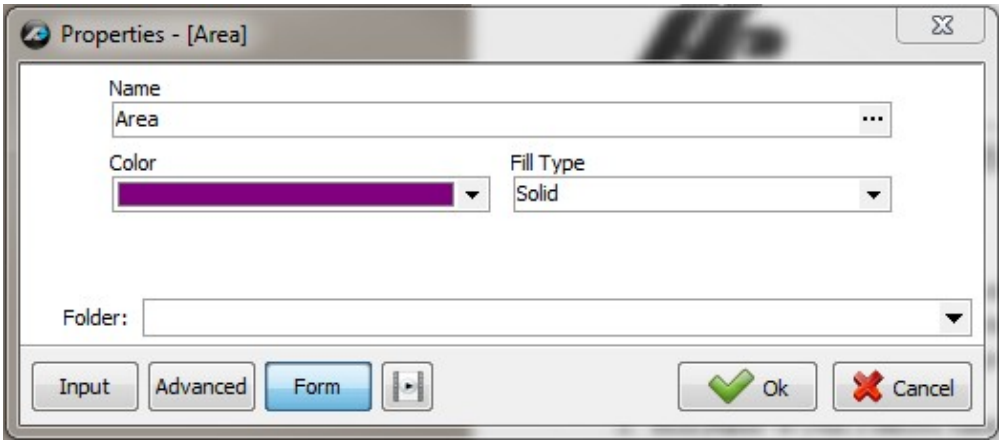
New Area Tool

Calculating square foot areas in PlanSwift is simple:

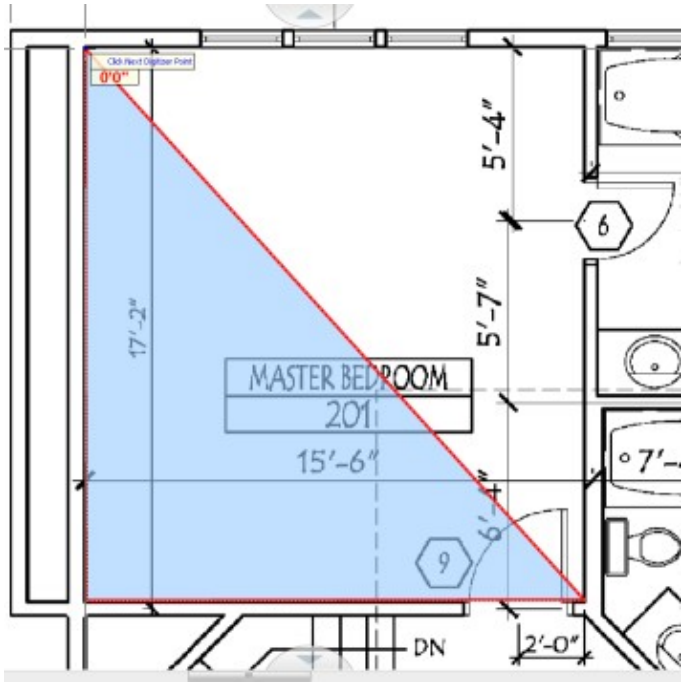
1. Open a plan image in the PlanSwift software, and press the Upper half of the New 'Area' button from the Toolbar. This will create a basic area. Selecting the lower half opens a drop down menu of tools based on the basic area object such as the Joist Tool.

2. Enter a name for the area, and choose a color.

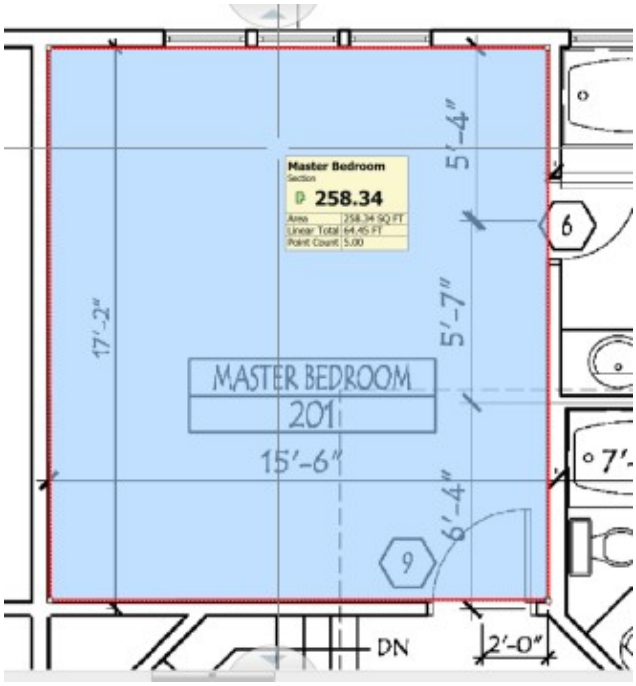
3. Click the 'Ok' button.



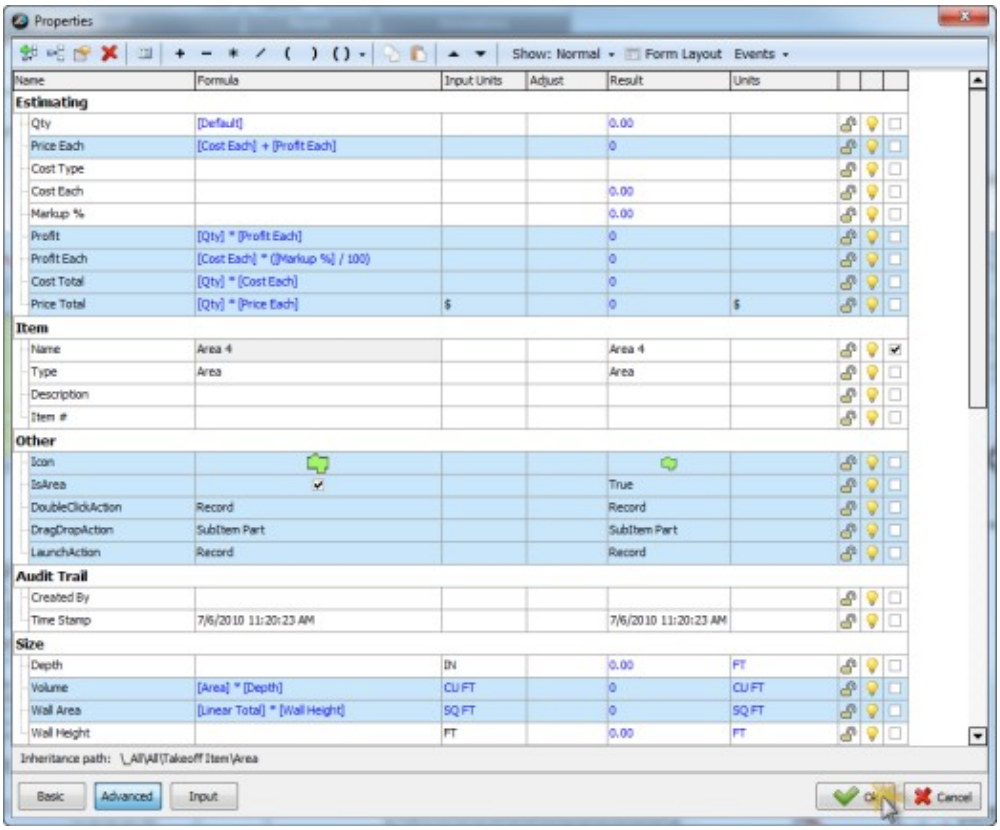
4. Set points on the outside of the area you wish to use.



5. After the area is completed, right mouse click and choose Stop. Notice the square footage is reported next to the area's name underneath the plan image that contains the area. To continue digitizing a different section with the same area press the green button next to the item in the pages list or you can right click on the area and select 'New Section'.



The 'Advanced' option button will provide you will more options if you wish to use them.

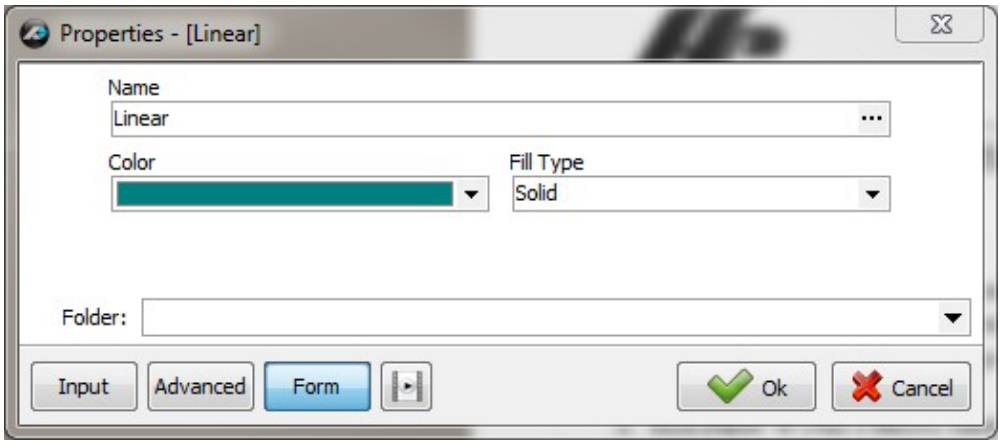


To watch a video about how to takeoff a new area, click here.

New Linear Tool

The "New Linear" tool allows you to create a Linear digitized item on your plan.

1. Select LINEAR to open the linear tool box.



2. On this window, you can name your Linear item and choose a color for it.

PlanSwift automatically picks a random color, if you would like a different color, simply click the drop down menu under "Color".

The "New Linear" tool is very easy to use.

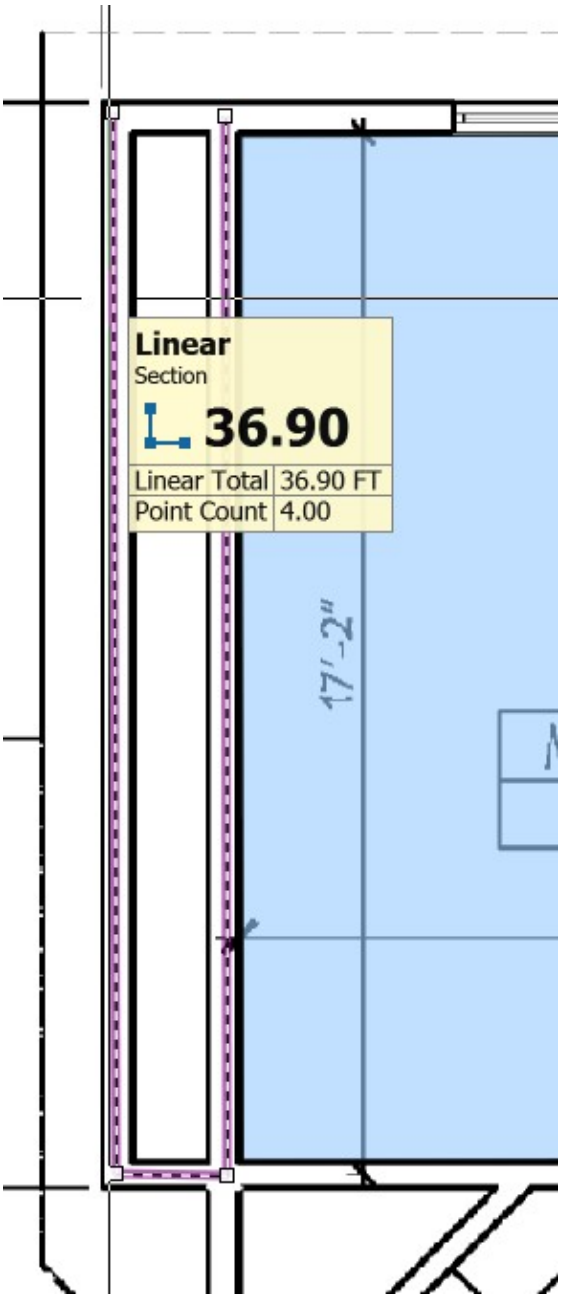
3. When you are finish setting the properties select the OK button to continue.

Make sure your page is scaled, if not , PlanSwift will automatically open the "Scale" window.

Notice that the "Digitizer Record" button red, this indicates that the on-screen digitizer in now working.

4. Simply click on the endpoints of your Linear item. If you accidentally click in the wrong spot, you can undo it by pressing "Backspace" or "Ctrl-z" on your keyboard.

5. End the on-screen digitizer by pressing "Esc" or by clicking the "Digitizer Record" button.

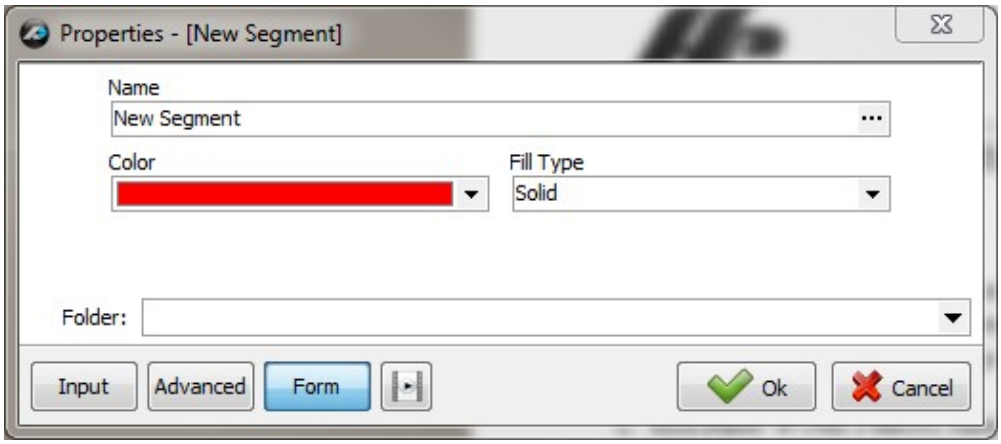


To watch a video about how to takeoff a new linear, click here.

New Segment Tool

The "New Segment" tool allows you to create a â Segmentâ digitizer. The Segment digitizer draws individual line segments but returns the total linear measurement for that object.

1. Click on the SEGMENT button to start.



2. The properties window allows you to name your Segment and choose a color for it. PlanSwift will automatically pick a random color. If you would like to use a different color, click on the drop down menu under "Color".

3. Once you have filled out your information in the provided areas click OK to continue.

Make sure that your page is scaled, if not, PlanSwift will automatically open the "Scale" window.

Notice that the "Digitizer Record" is red. This indicates that the on-screen digitizer is working. Now you may click on the endpoints each line for your Segments. If you accidentally click on the wrong endpoint, simply press "Backspace" or "Ctrl-z" on your keyboard.

4. Once you are finished, end the "Digitizer" tool by clicking the "Digitizer Record" button or by pushing "Esc" on your keyboard.

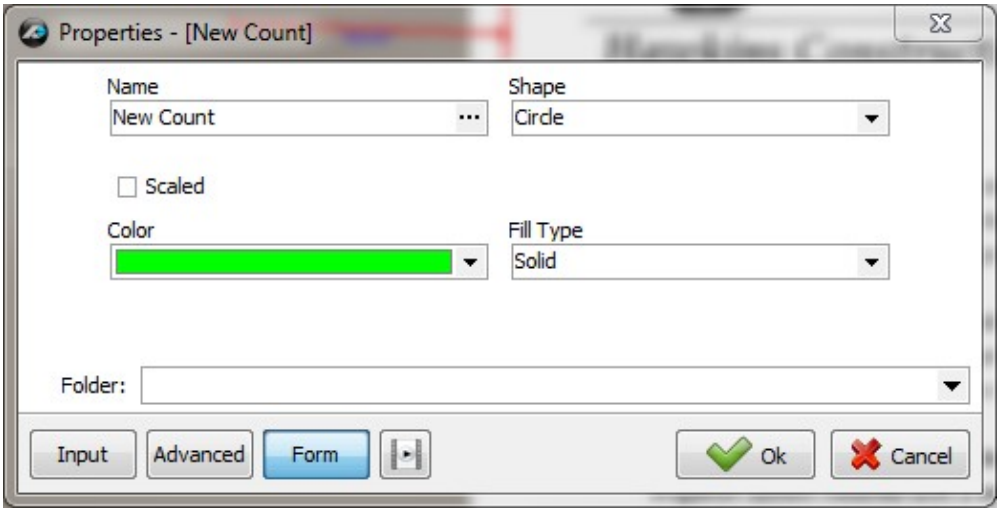
To watch a video about how to takeoff a new segment, click here.

New Count Tool

The "New Count" tool allows you to create a digitizer Count to mark and count items on the plan, allowing you to quickly total up items on the plan.

1. Begin by selecting the COUNT button.

2. This window allows you to name your Count and choose a color for it. PlanSwift will automatically pick a random color. If you would like to use a different color, click on the drop down menu under "Color". If you select the 'Scaled' option, you will be allowed to edit the size of the points.



3. Once you have filled out your information in the provided areas click OK to continue.

Make sure your page is scaled, if not , PlanSwift will automatically open the "Scale" window.

Notice that the "Digitizer Record" button is now red, this indicates that the on-screen digitizer in now working. Now, simply click and mark your items that you want to be counted. If you accidentally click in the wrong spot, you can undo it by pressing "Backspace" or "Ctrl-z" on your keyboard.

4. End the on-screen digitizer by pressing "Esc" or by clicking the "Digitizer Record" button.

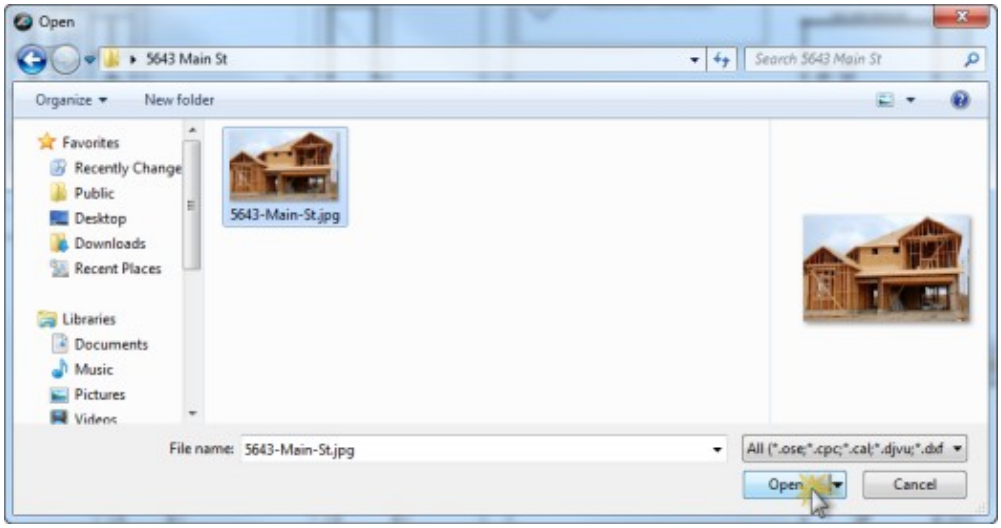
To watch a video about how to takeoff a new count, click here.

Image

You can add an image to any page in PlanSwift simply and quickly.

1. Select the page you want to add an image to.
2. Select the 'Image' button to start.

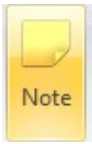
3. Select the image you want to add. You can browse to the image or enter the location.
4. Click 'Open' to continue.



5. Select the first point for the image, then holding the left mouse button you can size the image as you like.
6. Release the mouse button to finish.

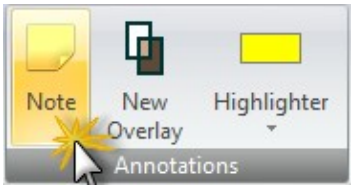
To watch a video about adding an image to a page, click here.

Notes



Making notes on a plan is simple.

1. Select the 'Note' button from the annotations menu.



2. Select where on the page you want to place the note and the size by dragging the square to the size you want.

3. When you release the square the notes properties button will open. Here you can type the note you want along with selecting color and size options.

Name - Allows you to give the note a useful name.

Text - Enter what you want the note to read.

Font Name - Allows you to change the font used in the note.

Text Height - Allows you to change the size of the text by entering an new number in the field.

Color - Allow you to select the color of the note. To change colors click the drop down menu and a full color option menu will be available.

Transparency - Allows you to set how much of the page behind the not is visible.

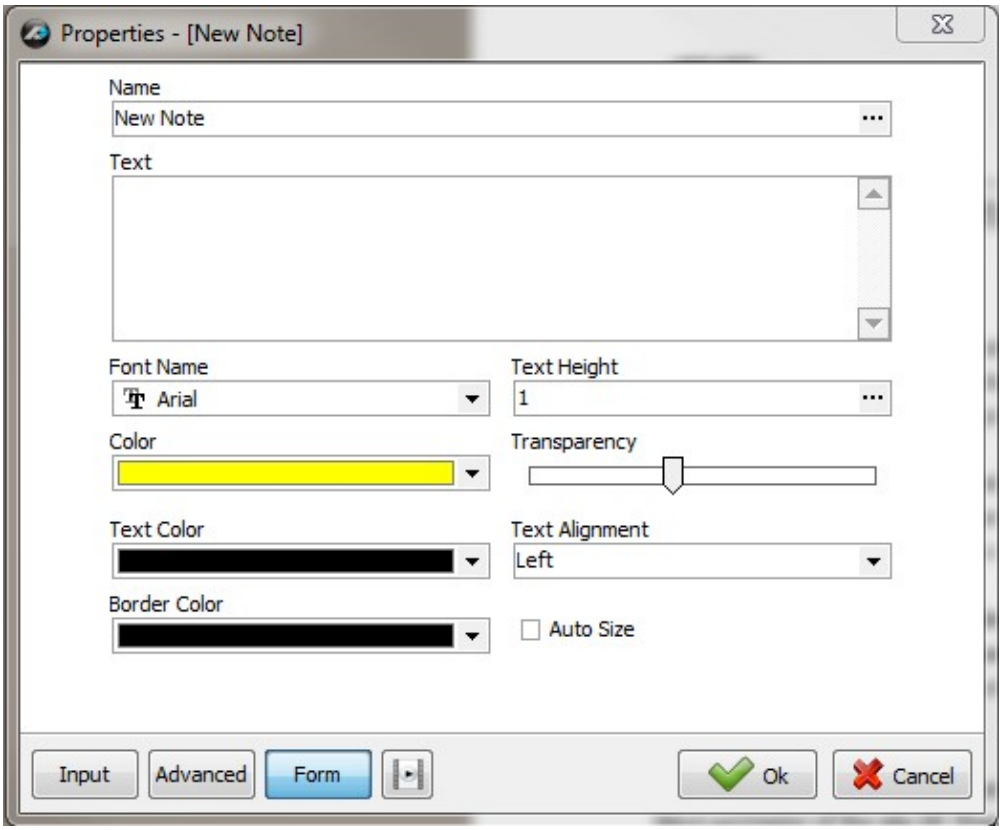
Text Color - Allows you to set the color of the text used in the note.

Text Alignment - Select the alignment of the text: left, center, or right.

Border Color - Allows you to select the color of the note border, or no color at all.

Auto Size - When selected will automatically change the size of the note to fit your text.

4. When done click the 'Ok' button to close the box. Your note is now finished.



To watch a video about creating page notes, click here.

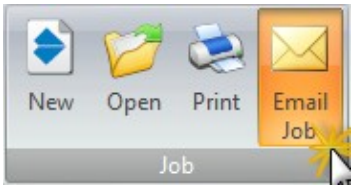
Email Jobs

Email Plans

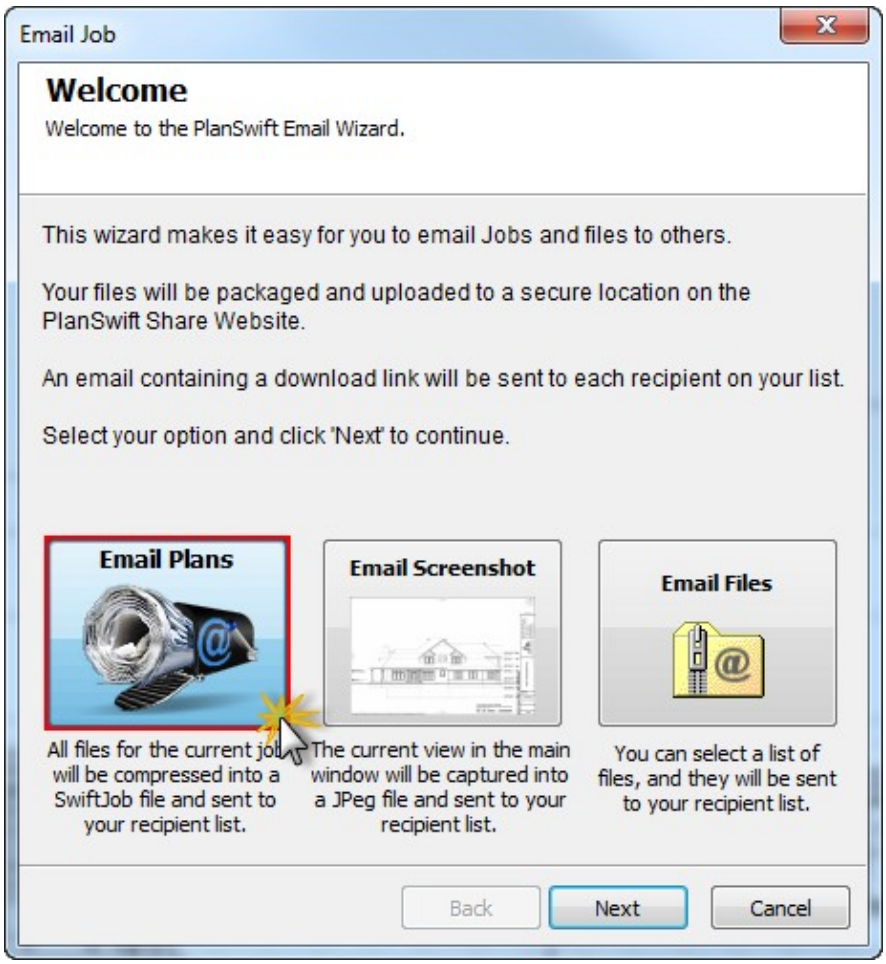
Emailing job plans to one or more people is fast and easy with PlanSwift.

You have several options, you can email plans, email a screenshot or email files you select.

1. To email plans select the 'Email Job' button.

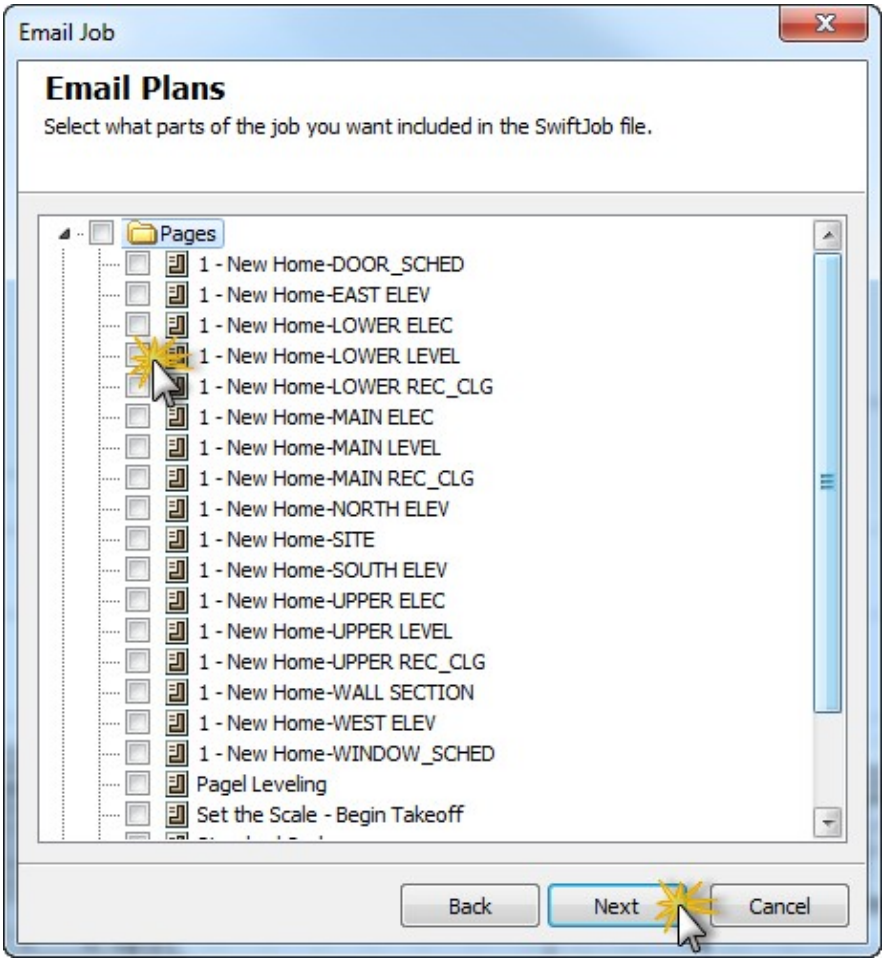


2. Select 'Email Plans' and the 'Next' button.


Email Job
Welcome
Welcome to the PlanSwift Email Wizard.
This wizard makes it easy for you to email Jobs and files to others.
Your files will be packaged and uploaded to a secure location on the PlanSwift Share Website.
An email containing a download link will be sent to each recipient on your list.
Select your option and click 'Next' to continue.
Email Plans
All files for the current job will be compressed into a SwiftJob file and sent to your recipient list.
Email Screenshot
The current view in the main window will be captured into a JPeg file and sent to your recipient list.
Email Files
You can select a list of files, and they will be sent to your recipient list.
Back
Next
Cancel

3. Select the plans you want to email be checking the box in front of the plan. To select all pages in a plan folder mark the check box for the folder.

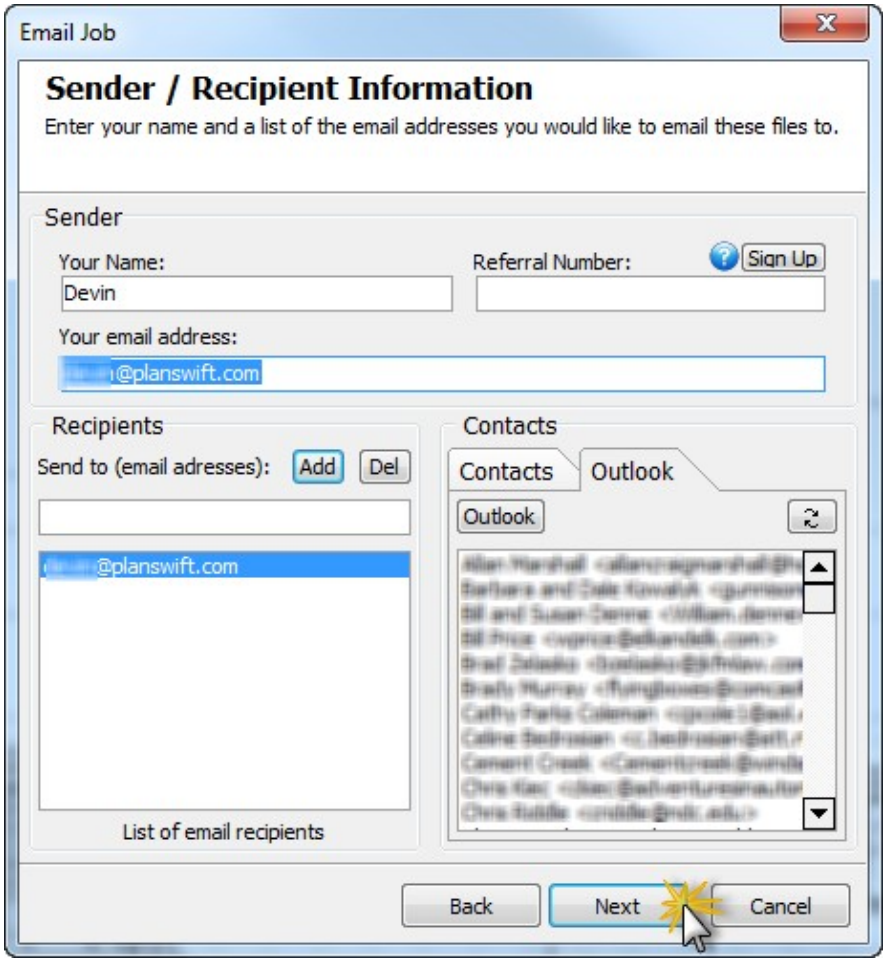
4. After selecting all the plans you want to email click the 'Next' button to continue.


Email Job
Email Plans
Select what parts of the job you want included in the SwiftJob file.
Pages
1 - New Home-DOOR_SCHED
1 - New Home-EAST ELEV
1 - New Home-LOWER ELEC
1 - New Home-LOWER LEVEL
1 - New Home-LOWER REC_CLG
1 - New Home-MAIN ELEC
1 - New Home-MAIN LEVEL
1 - New Home-MAIN REC_CLG
1 - New Home-NORTH ELEV
1 - New Home-SITE
1 - New Home-SOUTH ELEV
1 - New Home-UPPER ELEC
1 - New Home-UPPER LEVEL
1 - New Home-UPPER REC_CLG
1 - New Home-WALL SECTION
1 - New Home-WEST ELEV
1 - New Home-WINDOW_SCHED
Pagel Leveling
Set the Scale - Begin Takeoff
Back
Next
Cancel

5. Complete the Sender / Recipient Information including your name and email address.

To add recipients you can type their email address in the box and select 'Add or choose the name from your contacts or outlook list.

6. Select 'Next' to continue.



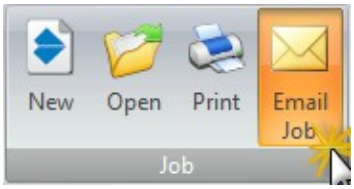
To watch a video about Emailing Plans, click here.

Email Screenshot

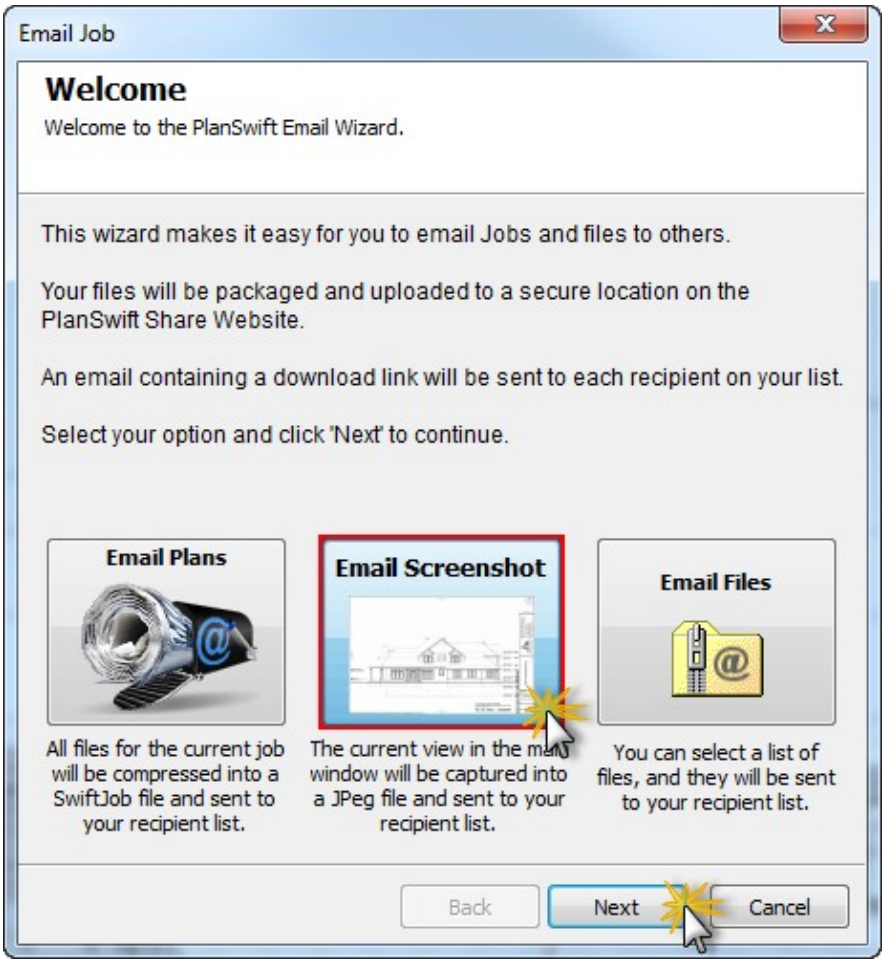
Emailing a screen shot to one or more people is fast and easy with PlanSwift.

You have several options, you can email plans, email a screenshot or email files you select.

1. To email a Screenshot select the 'Email Job' button.

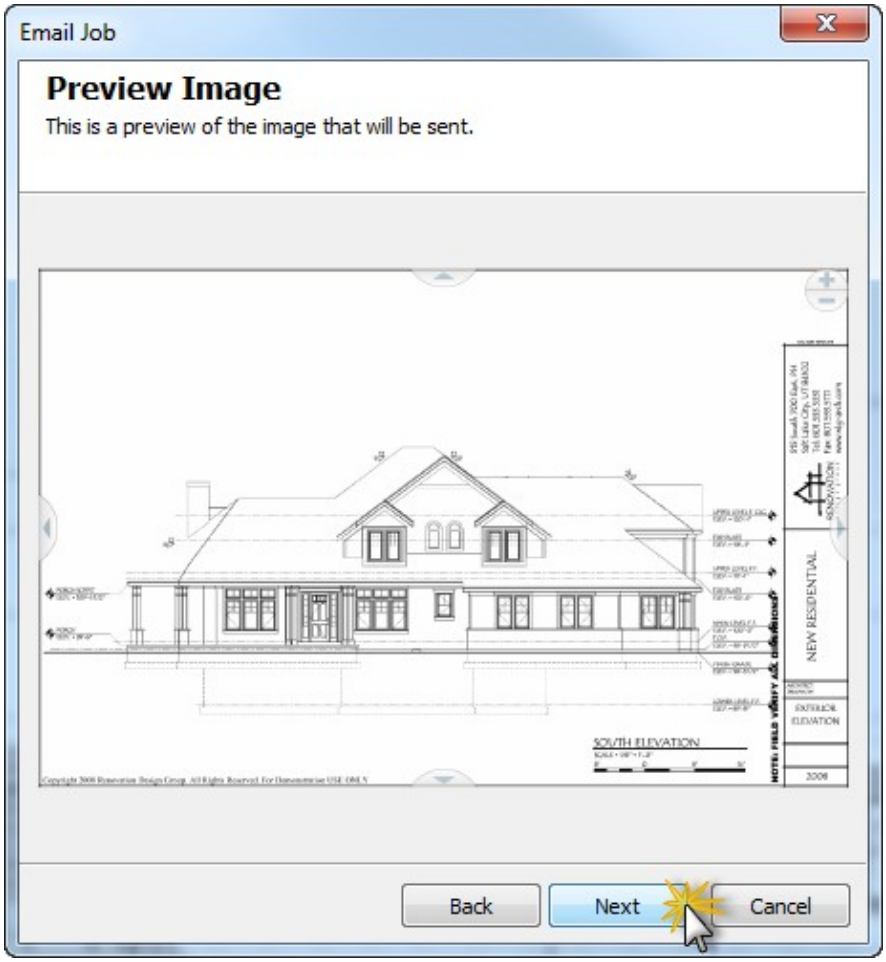


2. Then select 'Email Screenshot' and the 'Next' button to continue.


Email Job
Welcome
Welcome to the PlanSwift Email Wizard.
This wizard makes it easy for you to email Jobs and files to others.
Your files will be packaged and uploaded to a secure location on the PlanSwift Share Website.
An email containing a download link will be sent to each recipient on your list.
Select your option and click 'Next' to continue.
Email Plans
All files for the current job will be compressed into a SwiftJob file and sent to your recipient list.
Email Screenshot
The current view in the main window will be captured into a JPeg file and sent to your recipient list.
Email Files
You can select a list of files, and they will be sent to your recipient list.
Back
Next
Cancel

3. Preview the image to confirm it is what you want to send.

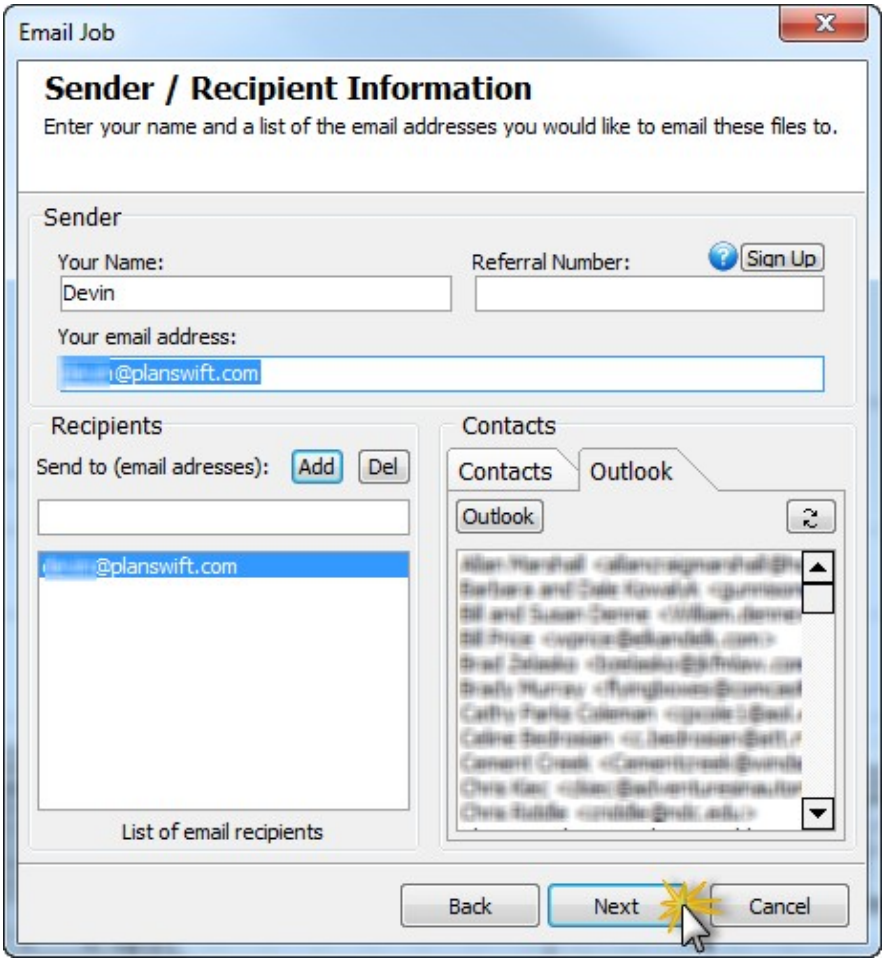
4. Click the 'Next' button to continue.



5. Complete the Sender / Recipient Information including your name and email address.

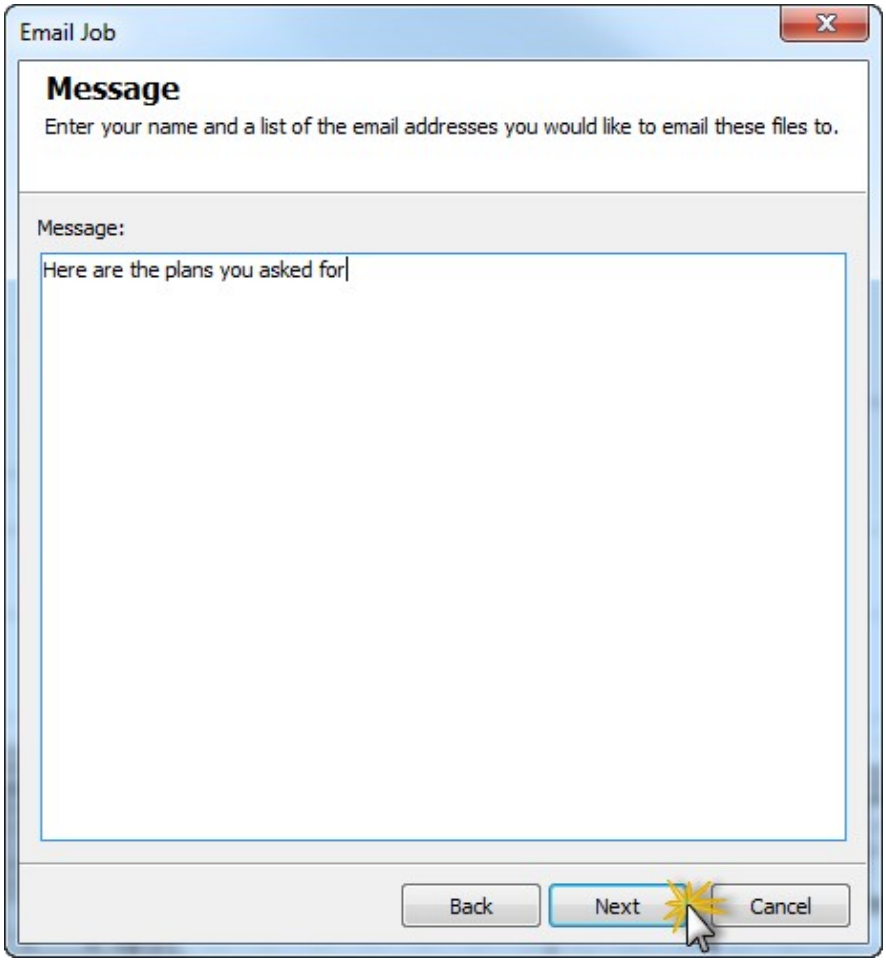
To add recipients you can type their email address in the box and select 'Add' or choose the name from your Contacts or Outlook list.

6. Select 'Next' to continue.

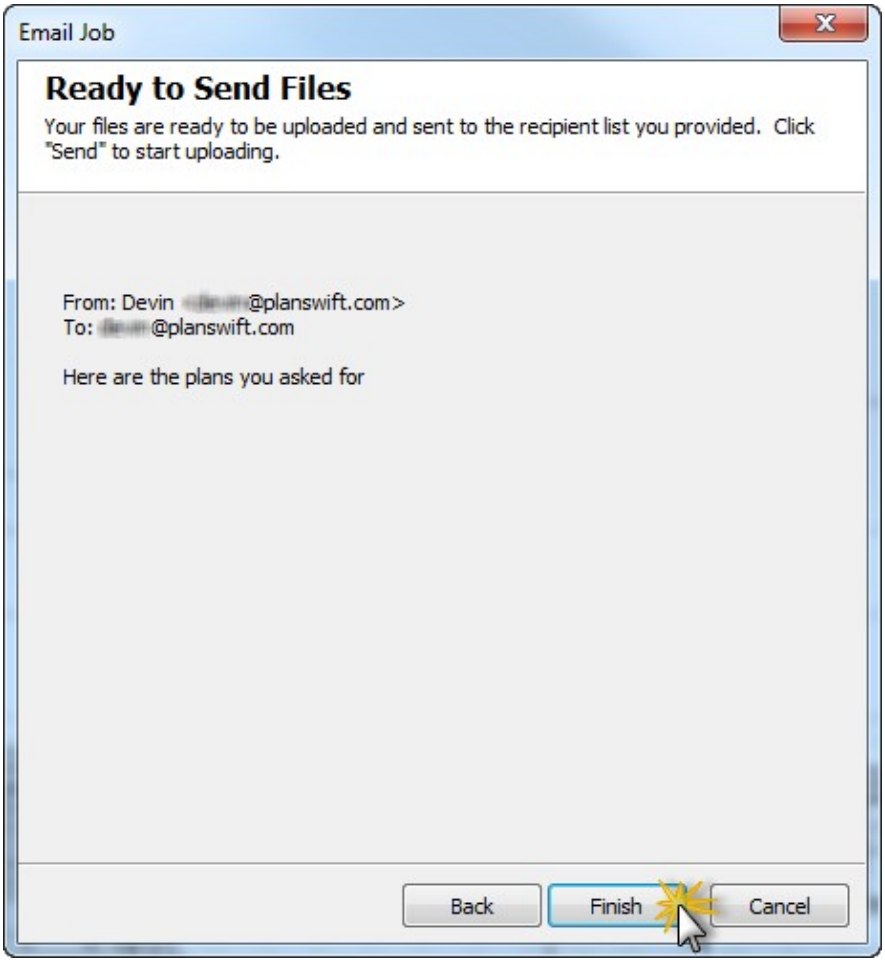


7. Enter a personal message to be sent with your email.

8. Click 'Next' to continue.


Email Job
Message
Enter your name and a list of the email addresses you would like to email these files to.
Message:
Here are the plans you asked for
Back
Next
Cancel

9. Confirm the information is correct. If you want to make changes select the 'Back' button.

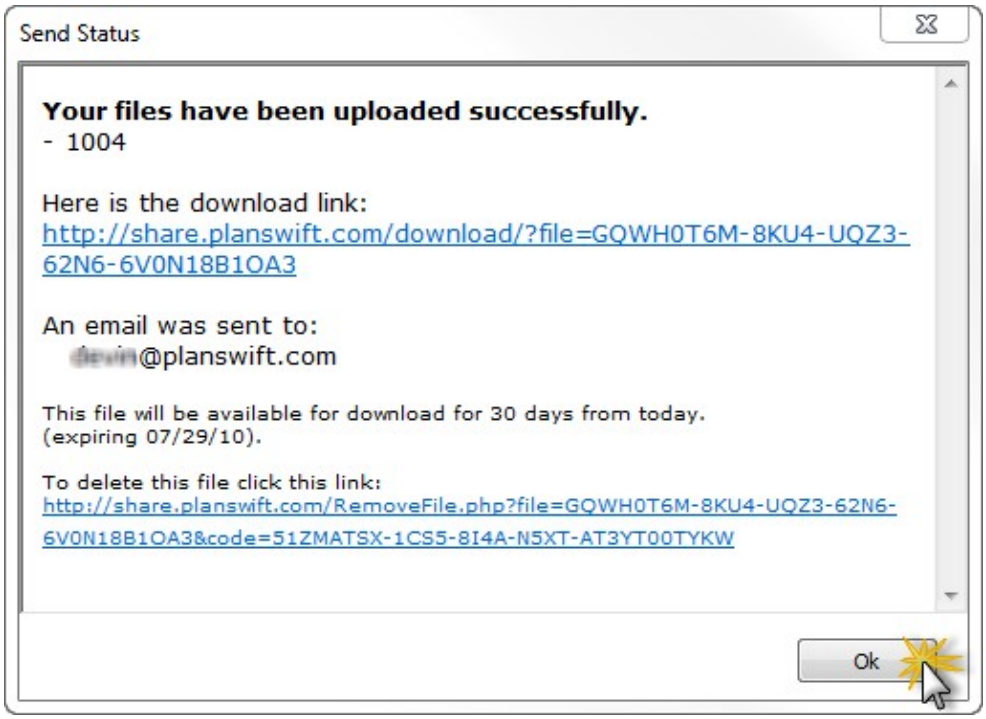

Email Job
Ready to Send Files
Your files are ready to be uploaded and sent to the recipient list you provided. Click "Send" to start uploading.
From: Devin @planswift.com>
To: @planswift.com
Here are the plans you asked for
Back
Finish
Cancel

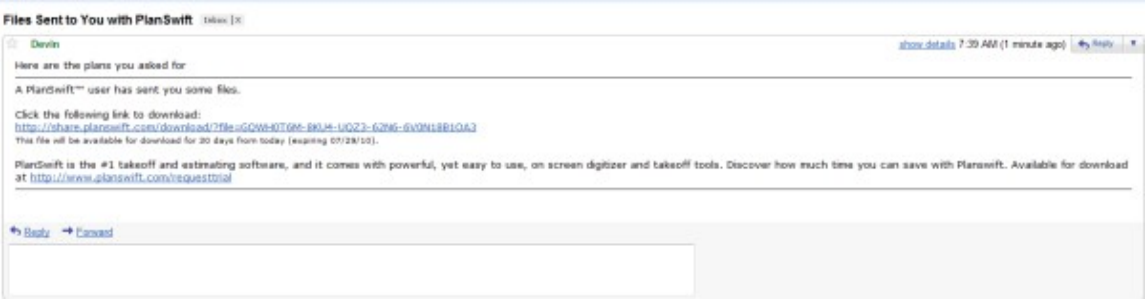
10. Click 'Finish' to send your plans.

11. Your files will be automatically upload to PlanSwift. When this process is complete you will see a message like this one.

The download link will allow access to download the plans you are sending. The recipient will also be sent this link and not the plans. This allow them to download and view the plans when they are ready.

12. Click the 'Ok' button to close this box.




Files Sent to You with PlanSwift
Devin
Here are the plans you asked for
A PlanSwift™ user has sent you some files.
Click the following link to download:
PlanSwift is the #1 takeoff and estimating software, and it comes with powerful, yet easy to use, on screen digitizer and takeoff tools. Discover how much time you can save with Planswift. Available for download at http://www.planswift.com/requesttrial
Reply
Forward

The recipient will receive an email like this one that includes your message and a link to download the plans.

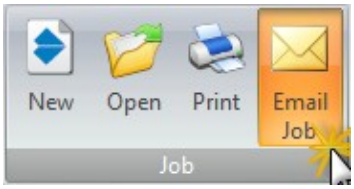
To watch a video about Emailing Screenshots, click here.

Email Files

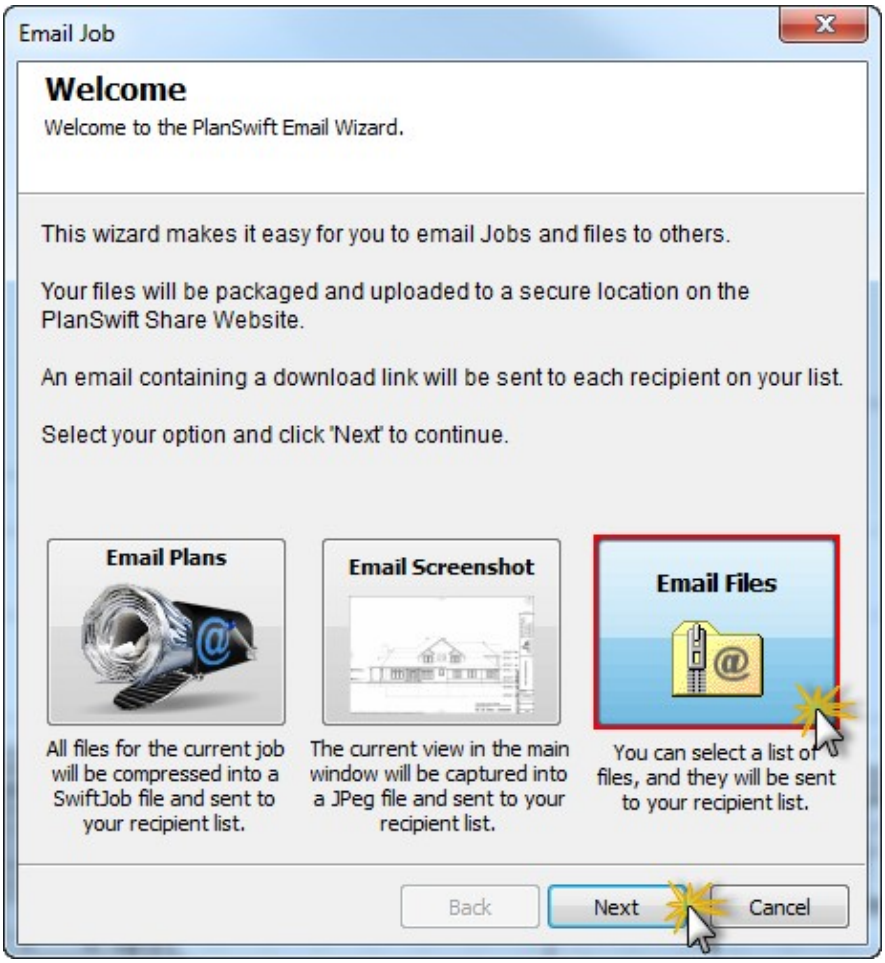
Emailing job plans to one or more people is fast and easy with PlanSwift.

You have several options, you can email plans, email a screenshot or email files you select.

1. To email files select the 'Email Job' button.



2. Select the 'Email Files' button and then click the "Next' button.

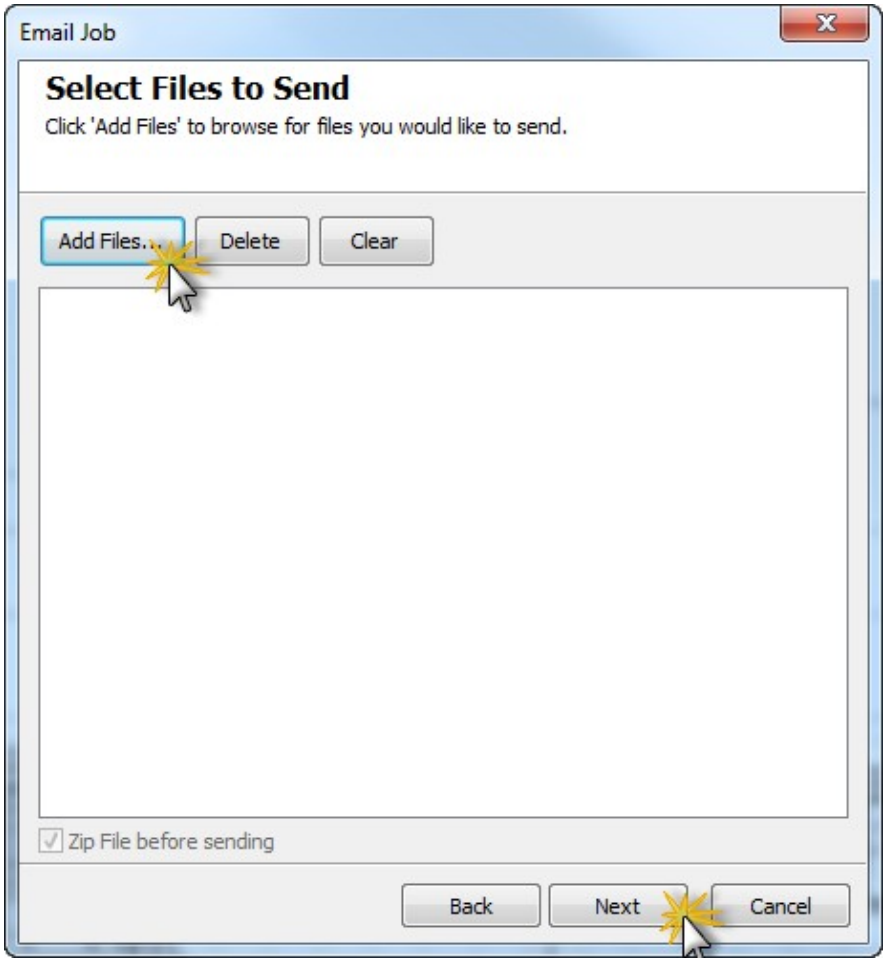

Email Job
Welcome
Welcome to the PlanSwift Email Wizard.
This wizard makes it easy for you to email Jobs and files to others.
Your files will be packaged and uploaded to a secure location on the PlanSwift Share Website.
An email containing a download link will be sent to each recipient on your list.
Select your option and click 'Next' to continue.
Email Plans
All files for the current job will be compressed into a SwiftJob file and sent to your recipient list.
Email Screenshot
The current view in the main window will be captured into a JPeg file and sent to your recipient list.
Email Files
You can select a list of files, and they will be sent to your recipient list.
Back
Next
Cancel

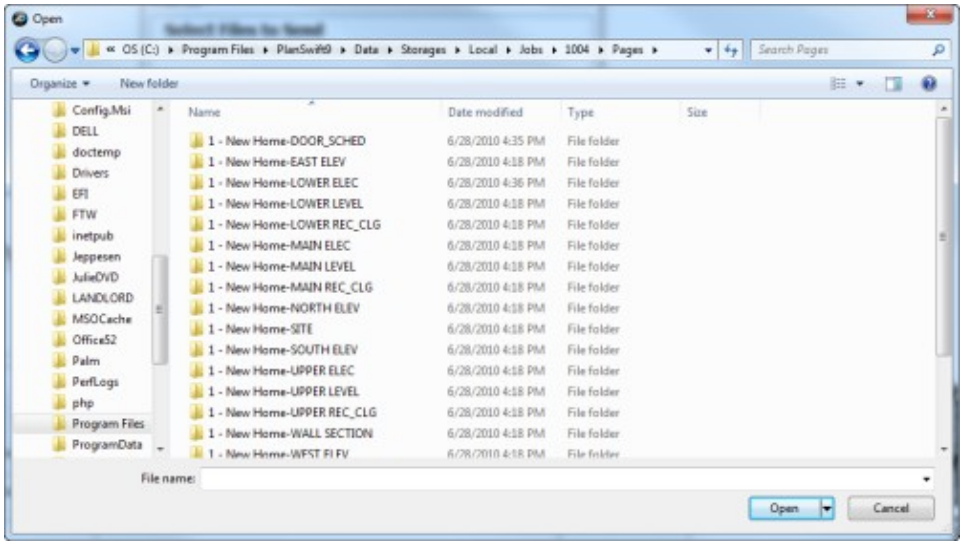
3. Select the 'Add Files' button to browse your files selecting the files you want.

4. Select the files you would like.

You can delete files if you change your mind or clear the entire list.

5. When you have selected all the files you want select the 'Next' button to continue.

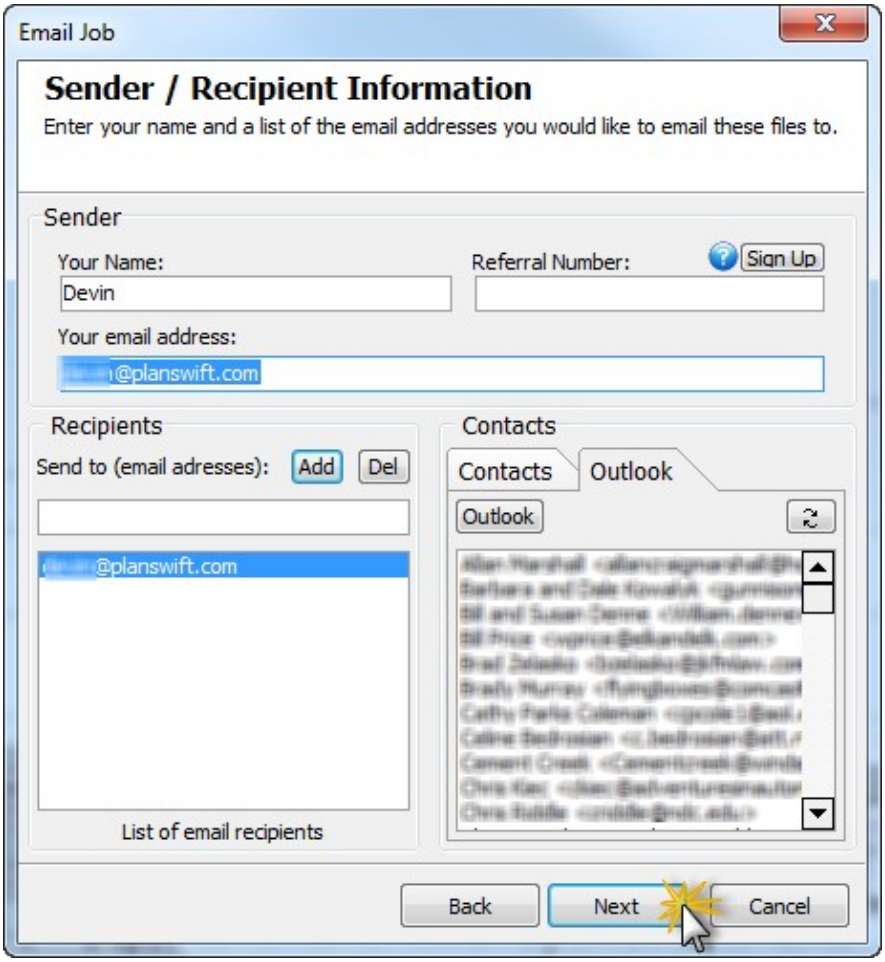




6. Complete the Sender / Recipient Information including your name and email address.

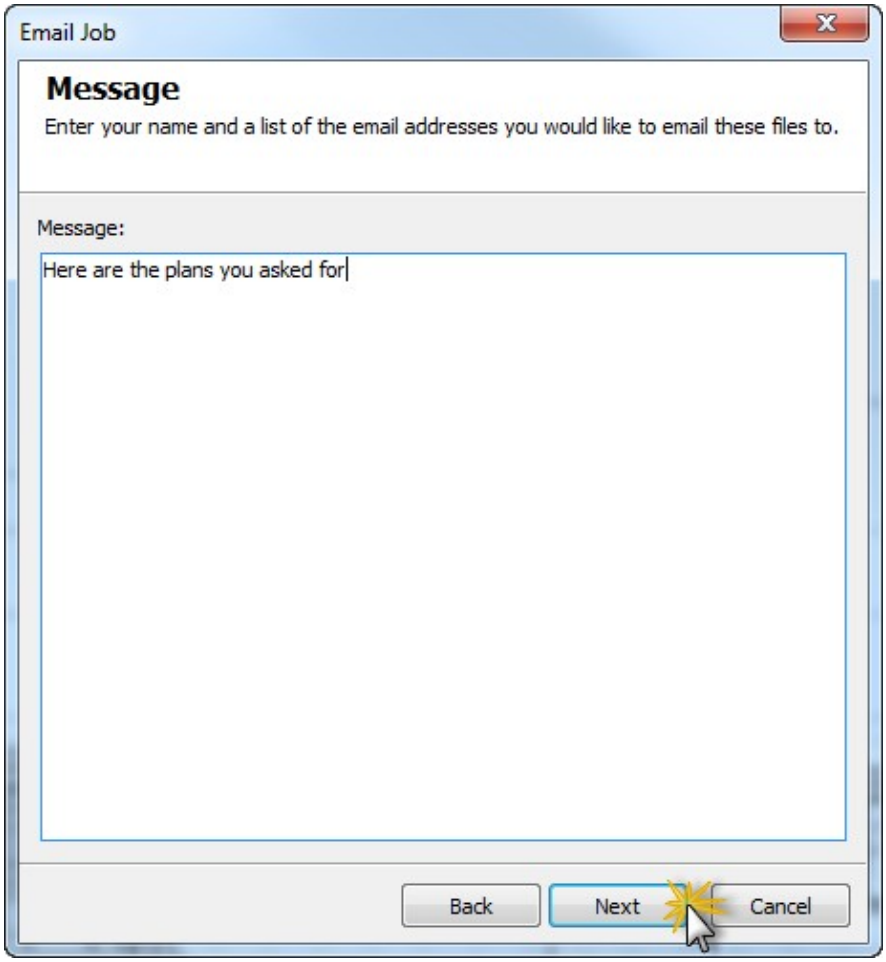
To add recipients you can type their email address in the box and select 'Add' or choose the name from your Contacts or Outlook list.

7. Click the 'Next' button to continue.



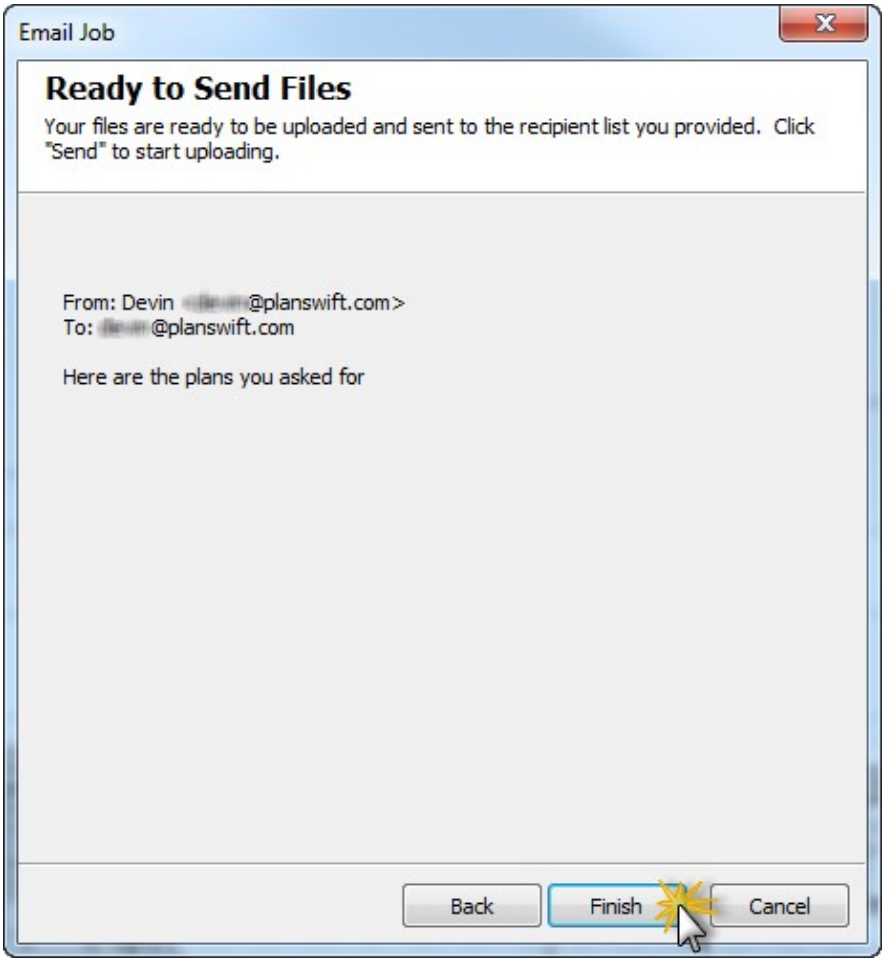
8. Enter a personal message to be sent with your email.

9. Select NEXT to continue.


Email Job
Message
Enter your name and a list of the email addresses you would like to email these files to.
Message:
Here are the plans you asked for
Back
Next
Cancel

10. Confirm the information is correct. If you want to make changes click the 'back' button.

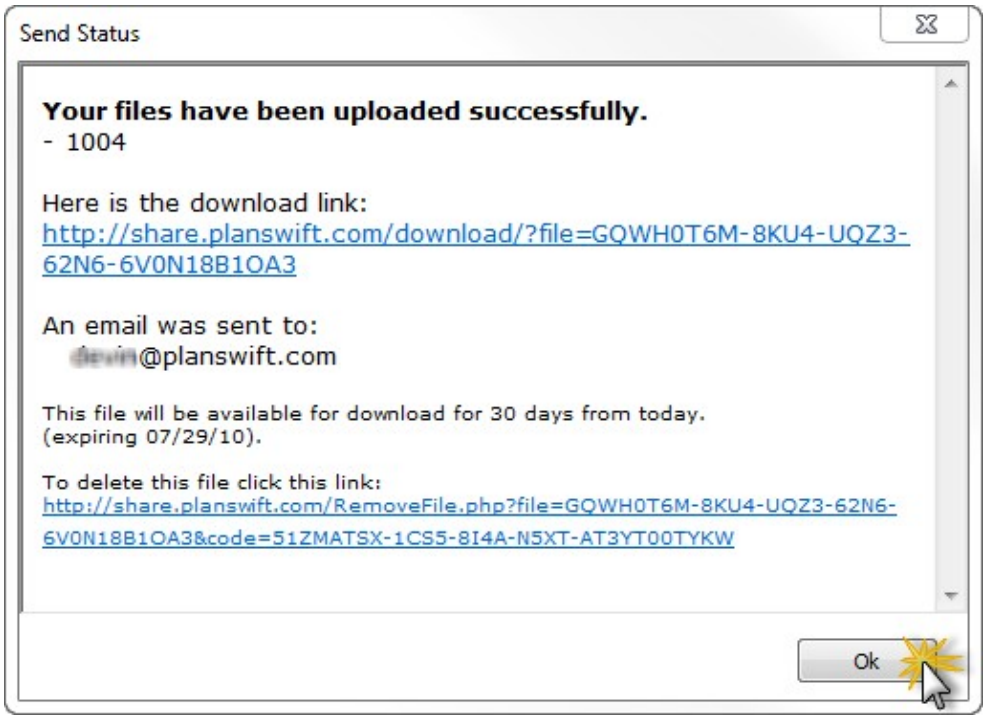
11. Click the 'Finish' button to send your plan files.


Email Job
Ready to Send Files
Your files are ready to be uploaded and sent to the recipient list you provided. Click "Send" to start uploading.
From: Devin @planswift.com>
To: @planswift.com
Here are the plans you asked for
Back
Finish
Cancel

12. Your files will be automatically upload to PlanSwift. When this process is complete you will see a message like this one.

The download link will allow access to download the plans you are sending. The recipient will also be sent this link and not the plans. This allow them to download and view the plans when they are ready.

13. Click the 'Ok' button to close this box.



The recipient will receive an email like this one that includes your message and a link to download the plans.

Files Sent to You with PlanSwift
Devin
Here are the plans you asked for
A PlanSwift™ user has sent you some files.
Click the following link to download:
This file will be available for download for 30 days from today (expiring 07/29/10).
PlanSwift is the #1 takeoff and estimating software, and it comes with powerful, yet easy to use, on screen digitizer and takeoff tools. Discover how much time you can save with Planswift. Available for download at http://www.planswift.com/requesttrial
Reply
Forward

To watch a video about Emailing Files, click here.

Retrieving and Download Plans, Files and Screenshots

Retrieving and downloading plans sent to you by a PlanSwift user is simple, easy, and best of all can be done when you are ready.

The plans are stored on PlanSwift's servers until you request them. This keeps your computer or smart phone from slowing down with a download at a bad time.

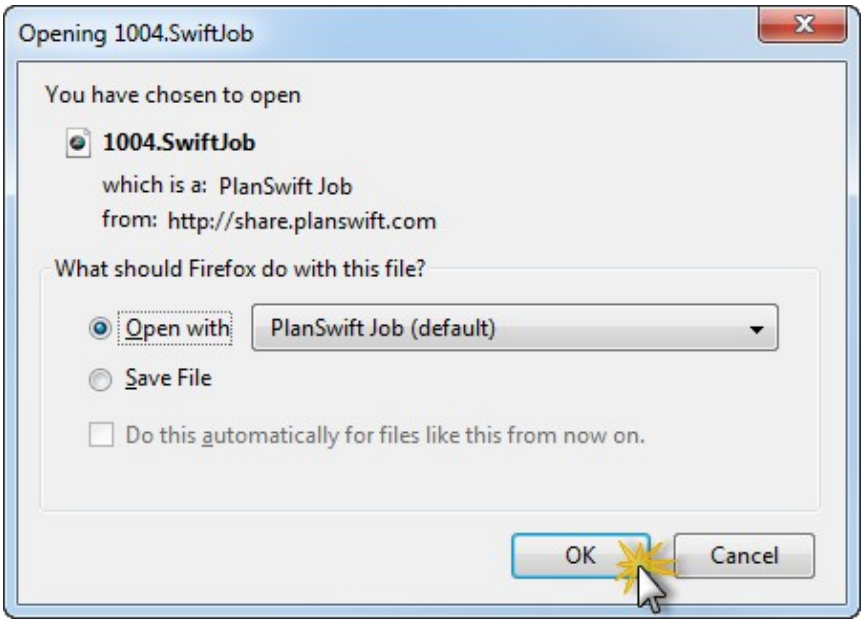
1. You should receive an email from the sender as soon as the plans, files or screenshot have completely uploaded.

2. Click on the blue link (highlighted here) or cut and paste this link into your browser to start the download.

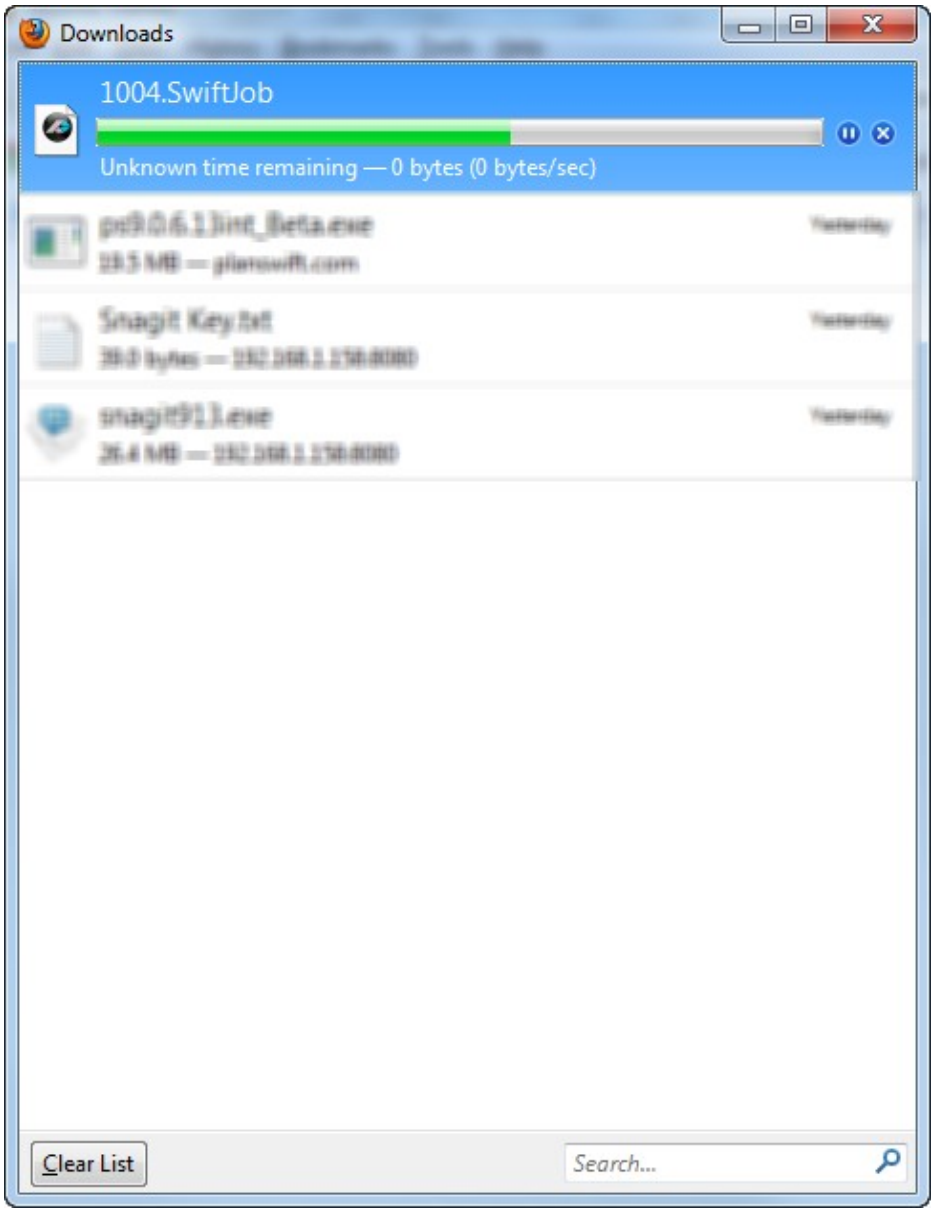
From:
To:
Cc:
Subject: Files Sent to You with PlanSwift
Sent: Tue 6/29/2010 9:21 AM
Here are the home plans you requested to see.
A PlanSwift™ user has sent you some files.
Click the following link to download:
This file will be available for download for 30 days from today (expiring 07/29/10).
PlanSwift is the #1 takeoff and estimating software, and it comes with powerful, yet easy to use, on screen digitizer and takeoff tools. Discover how much time you can save with Planswift. Available for download at http://www.planswift.com/requesttrial

3. Select if you want to open the file in PlanSwift or save the file on your computer.

4. Click the "Ok' button to continue.

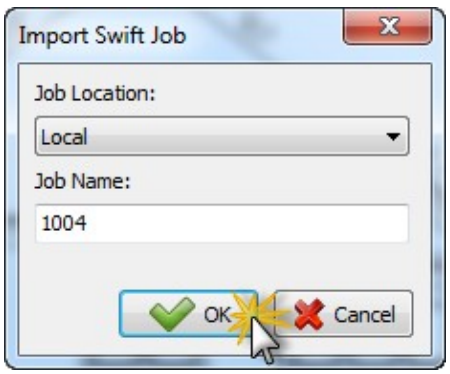


Depending on the size of the files and the speed of your connection the download may take several minutes.



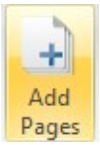
5. When importing the files into PlanSwift you can select the location the files will be stored and the Job name associated with the files.

6. Click the "Ok' button and you are done. The plans, screenshot or files are ready to use.



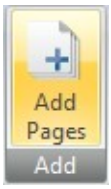
Page

Add Pages

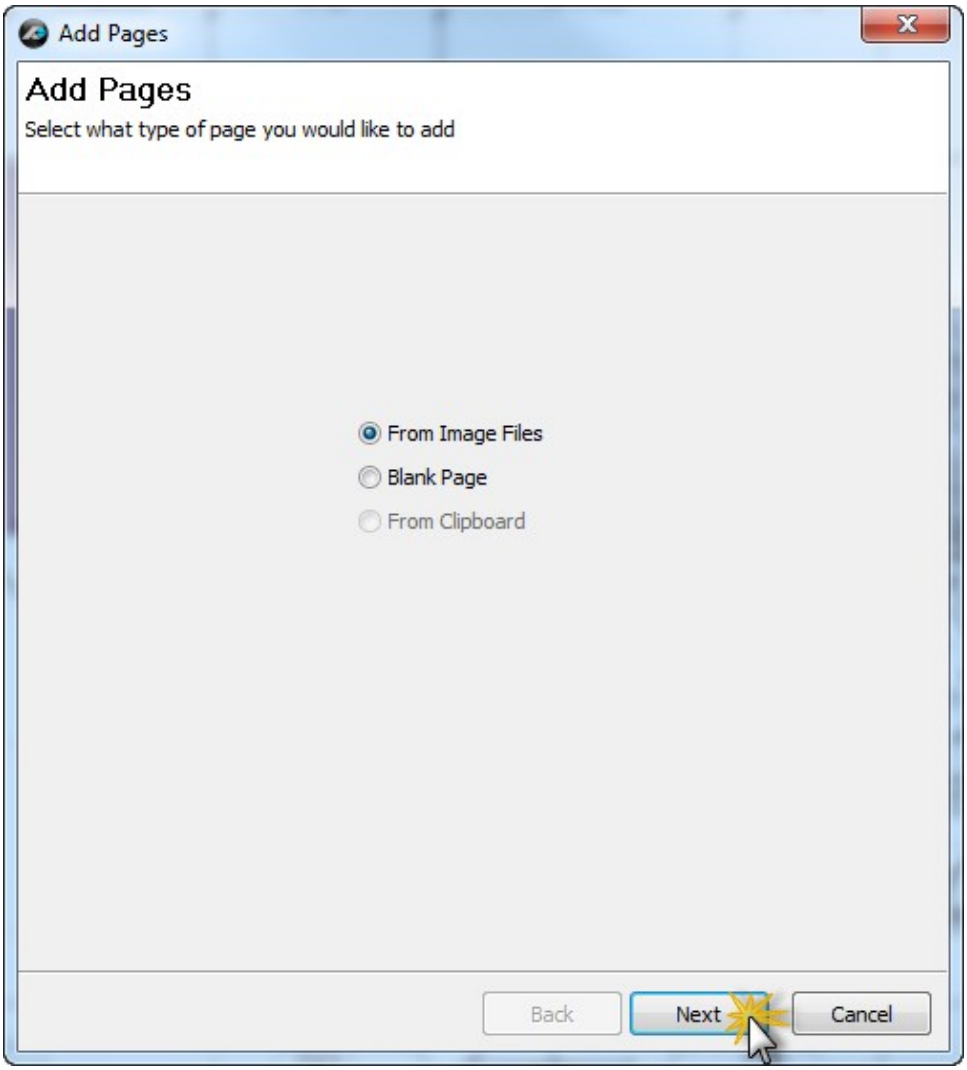


Add Pages Tool allows you to simply add new pages, either from a file or blank. This tool will also convert the file format is needed.

1. Select the 'Add Pages' button from the pages tab.

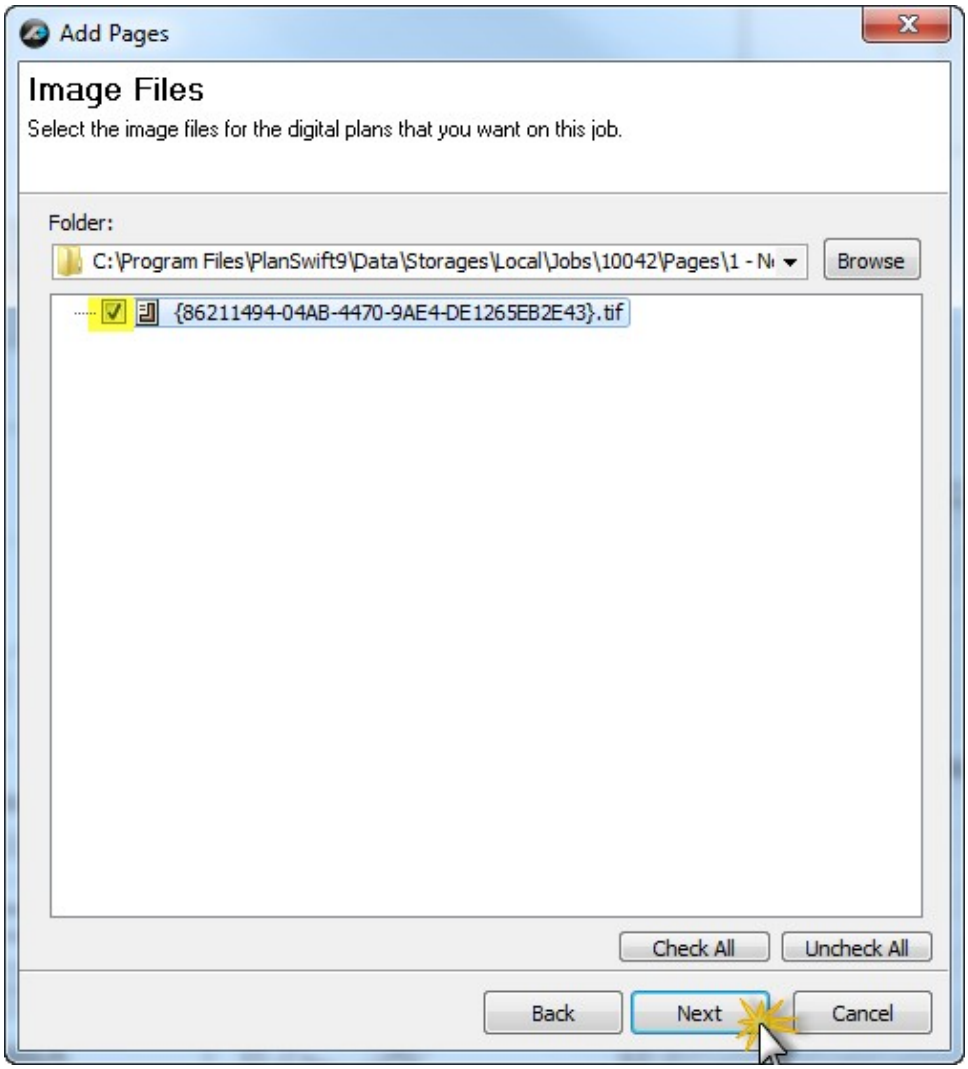


2. Select the type of page you would like to add. Then select the 'Next' button.

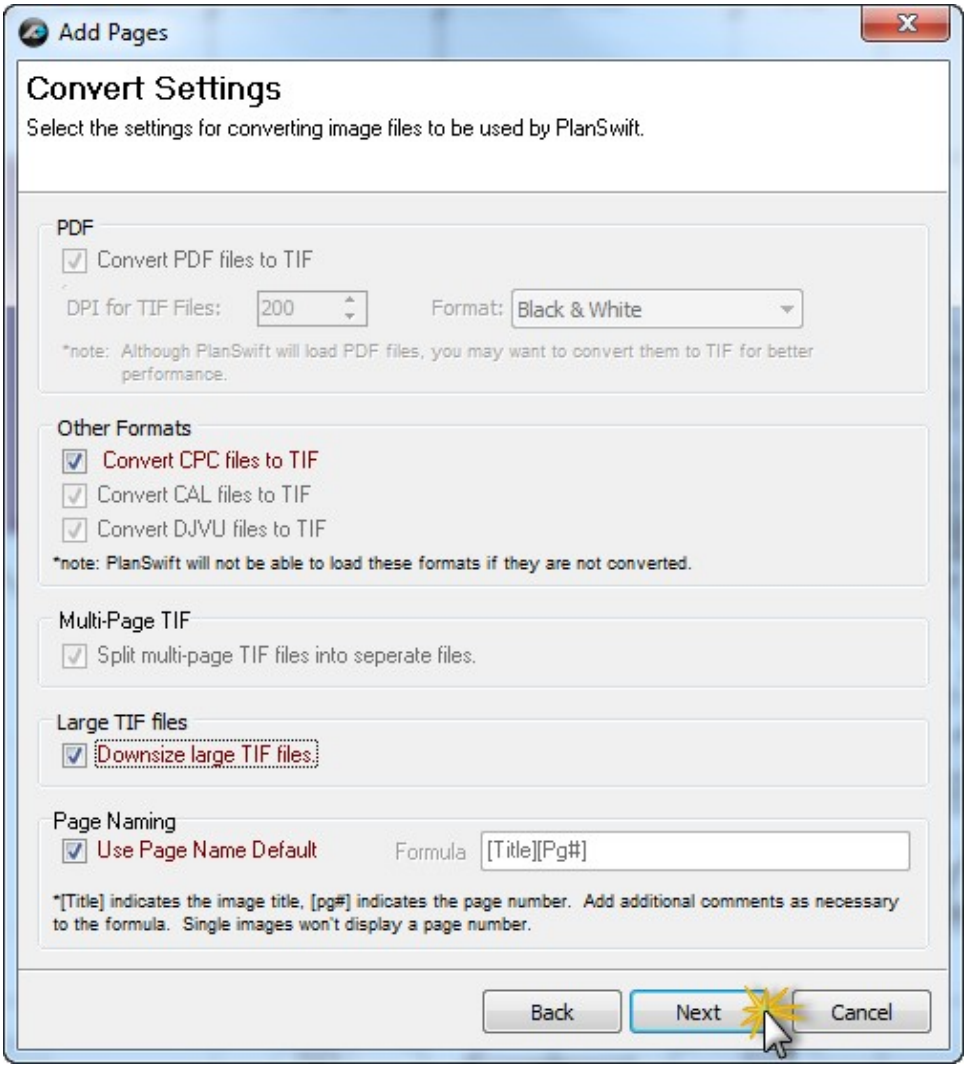


3. Select the files to be added. Make sure the check box is selected for the files you want to add.

4. Click the 'Next' button to continue.

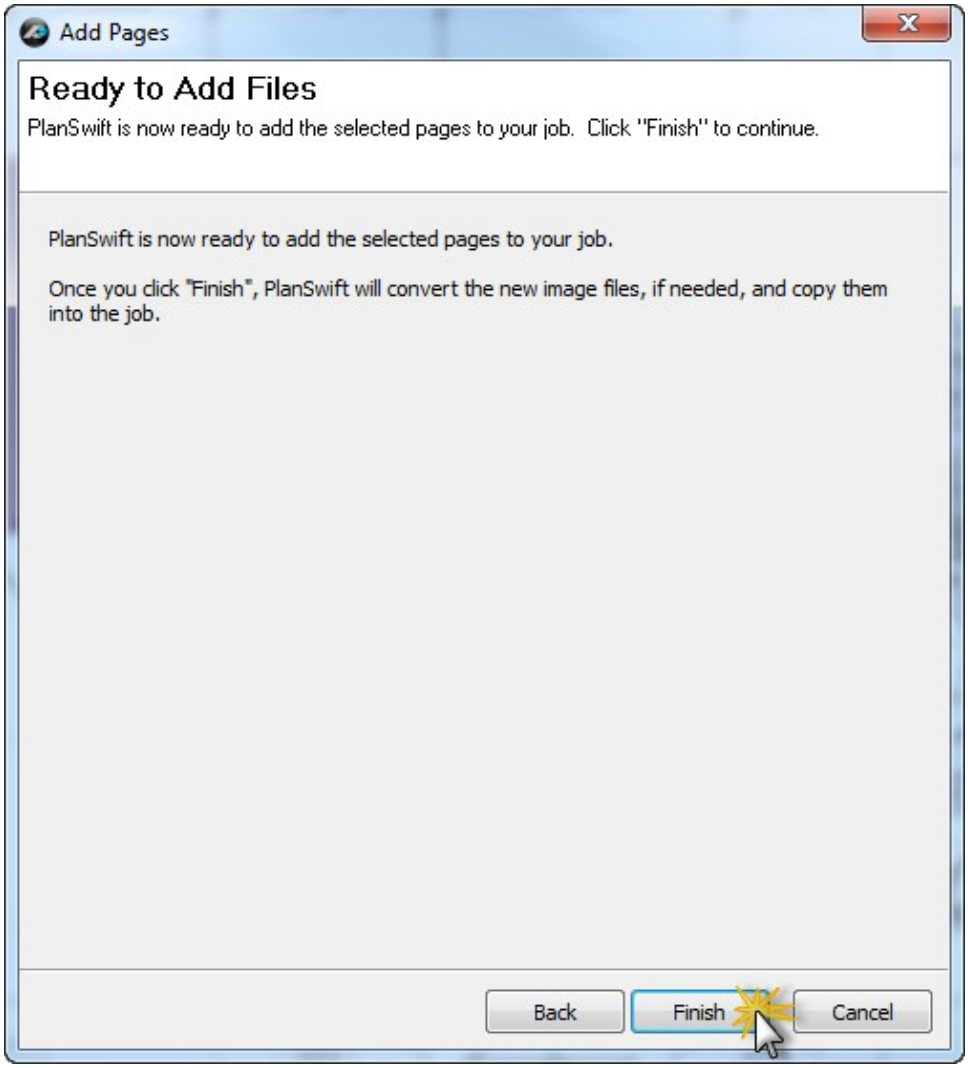


5. Set the converter functions as needed. Then click the 'Next' button.


Add Pages
Convert Settings
Select the settings for converting image files to be used by PlanSwift.
PDF
Convert PDF files to TIF
DPI for TIF Files:
200
Format:
Black & White
*note: Although PlanSwift will load PDF files, you may want to convert them to TIF for better performance.
Other Formats
Convert CPC files to TIF
Convert CAL files to TIF
Convert DJVU files to TIF
*note: PlanSwift will not be able to load these formats if they are not converted.
Multi-Page TIF
Split multi-page TIF files into seperate files.
Large TIF files
Downsize large TIF files.
Page Naming
Use Page Name Default
Formula
[Title][Pg#]
*[Title] indicates the image title, [pg#] indicates the page number. Add additional comments as necessary to the formula. Single images won't display a page number.
Back
Next
Cancel

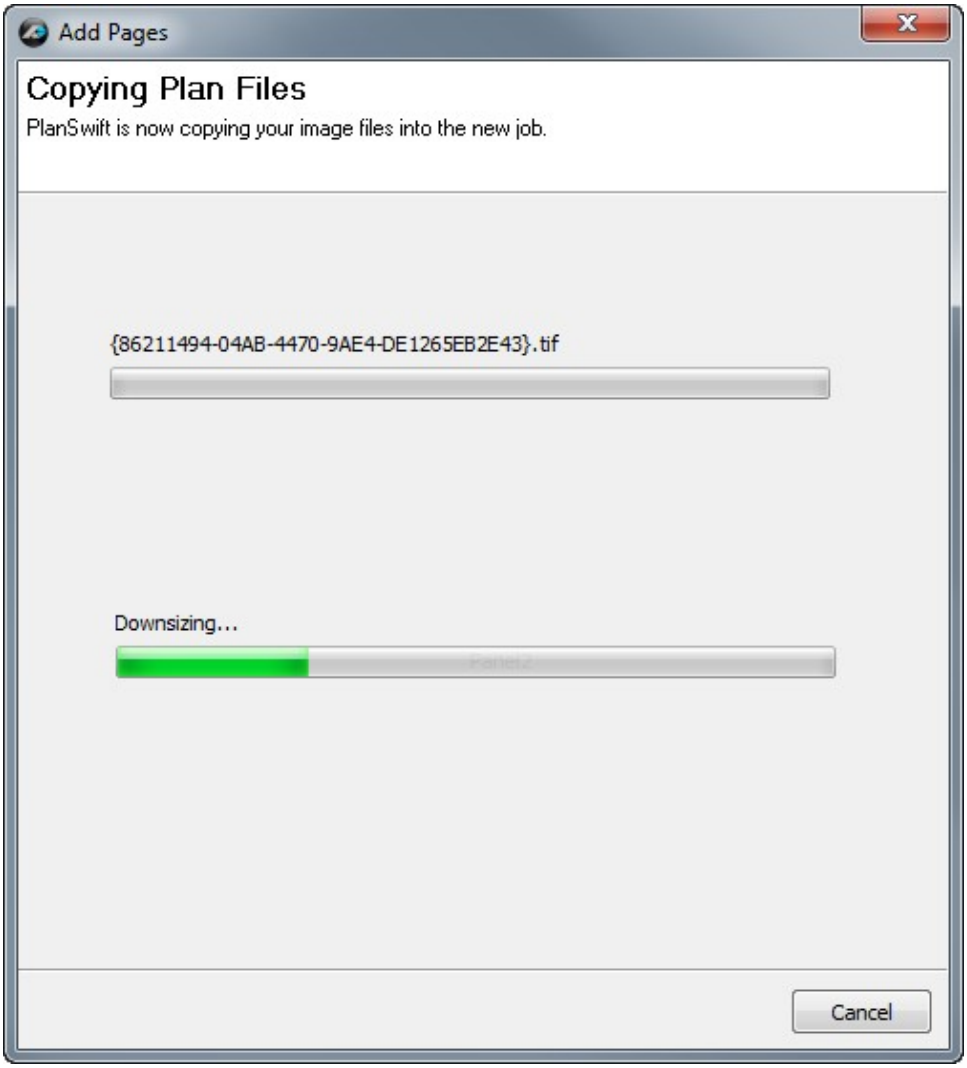
6. PlanSwift confirms you are ready to add the files. If you need to make changes you can select the 'Back' button.

7. Click 'Finish' to add the files.


Add Pages
Ready to Add Files
PlanSwift is now ready to add the selected pages to your job. Click "Finish" to continue.
PlanSwift is now ready to add the selected pages to your job.
Once you click "Finish", PlanSwift will convert the new image files, if needed, and copy them into the job.
Back
Finish
Cancel

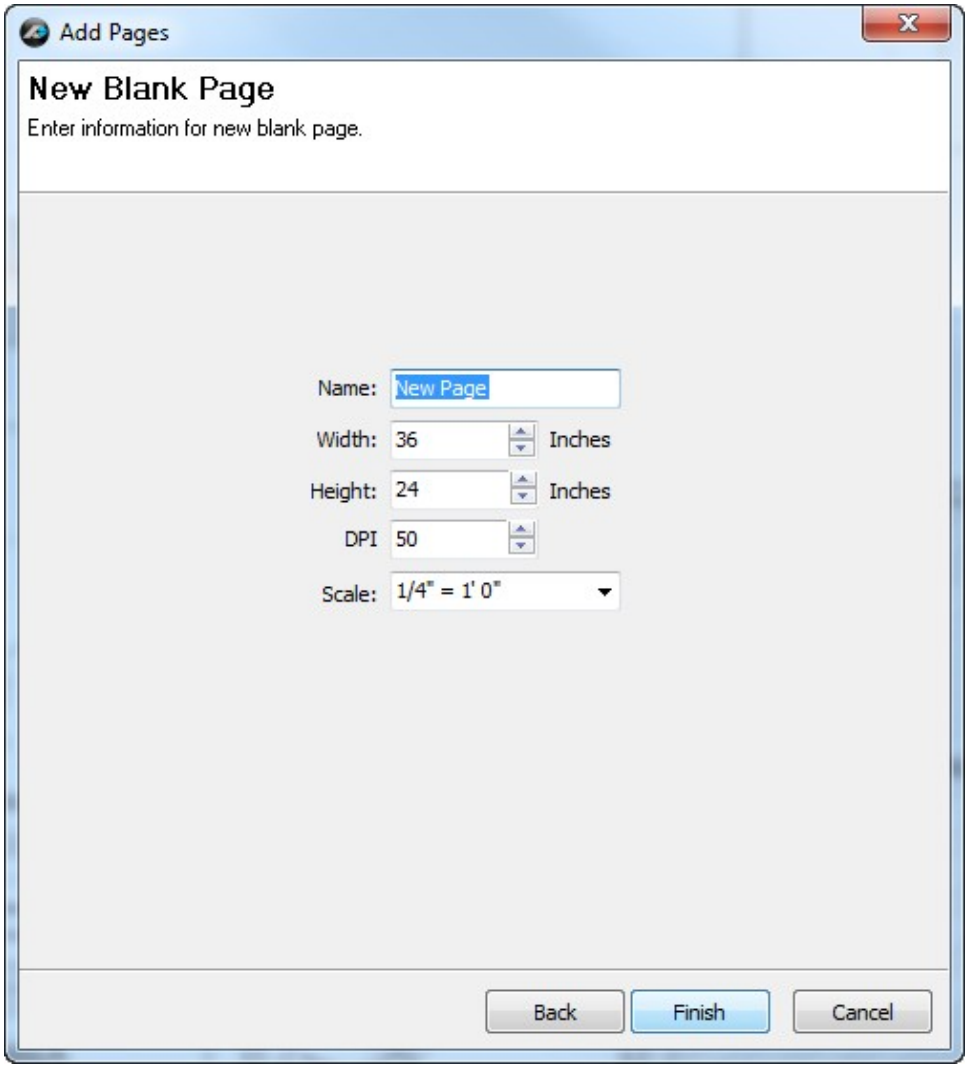
PlanSwift shows you the progress. Depending on the size and number of files this process may take several minutes.

When the process is complete this box will close and you will see the new pages.

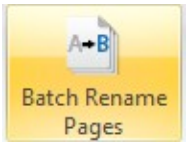


If you would rather add a blank page you will be taken to this page allowing you to select options.

Click 'Finish' and this page will be added to your job.

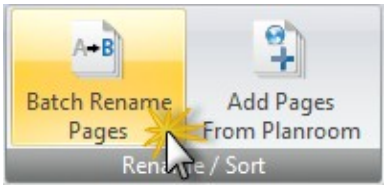

Add Pages
New Blank Page
Enter information for new blank page.
Name:
New Page
Width:
36
Inches
Height:
24
Inches
DPI
50
Scale:
1/4" = 1' 0"
Back
Finish
Cancel

Batch Rename Pages Tool



Batch Rename Pages tool makes it easy to rename multiple pages in a job.

1. Select the 'Batch Rename Pages' button.

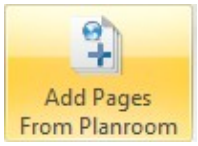


2. Rename the first page.

3. Selecting the 'Save & Prev.' or 'Save & Next' saves the current renamed file and moves you one level up or down the list.

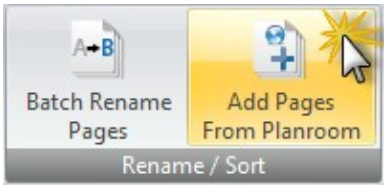
To watch the video about this topic, click here.

Add Pages From Planroom Tool



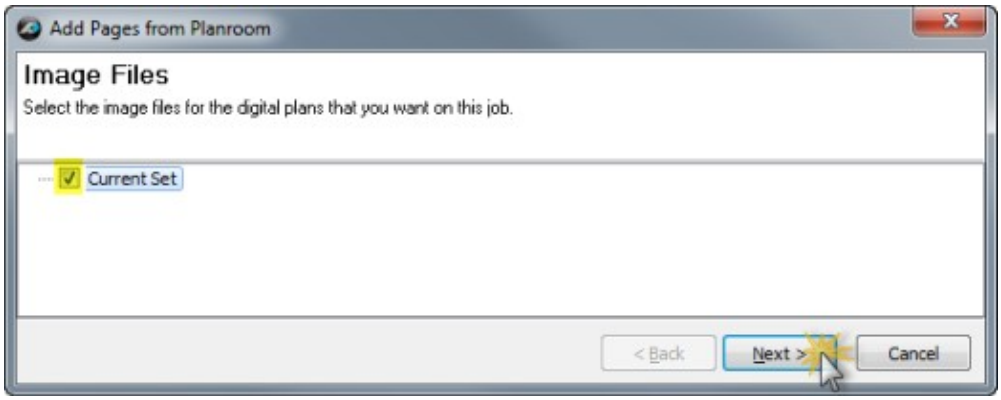
PlanSwift allows you to add pages from Planroom quickly and easily.

1. Select the 'Add Pages From Planroom' button.



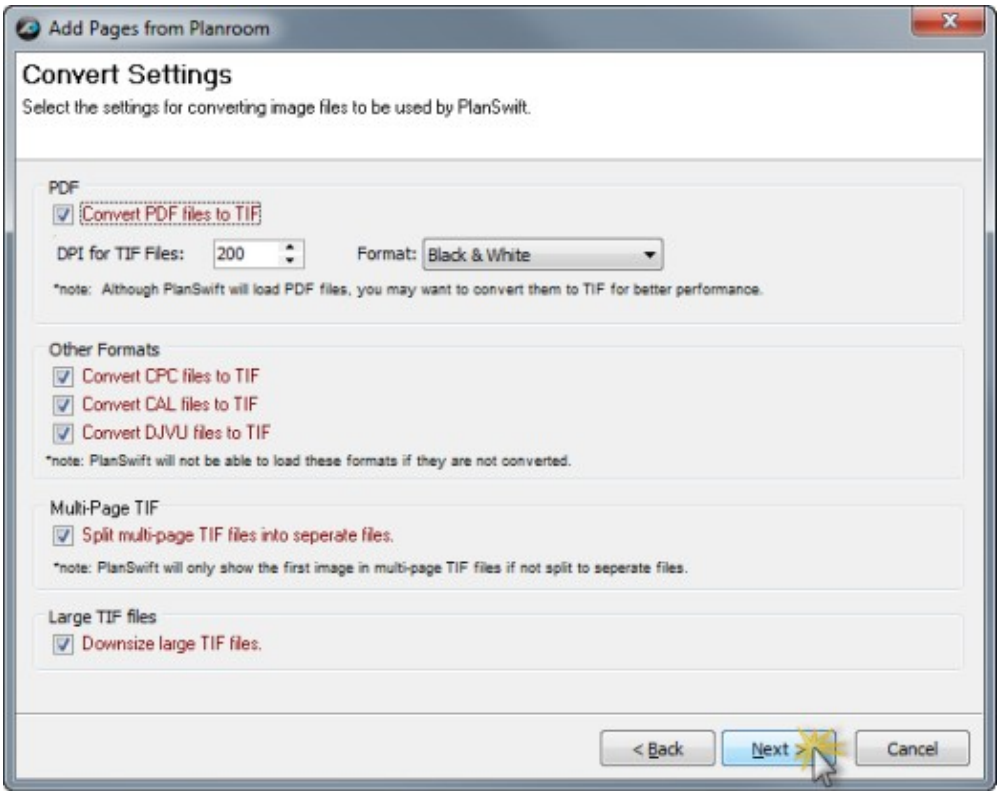
2. Select the images files you want to included in the job.

3. Click 'Next' to continue.

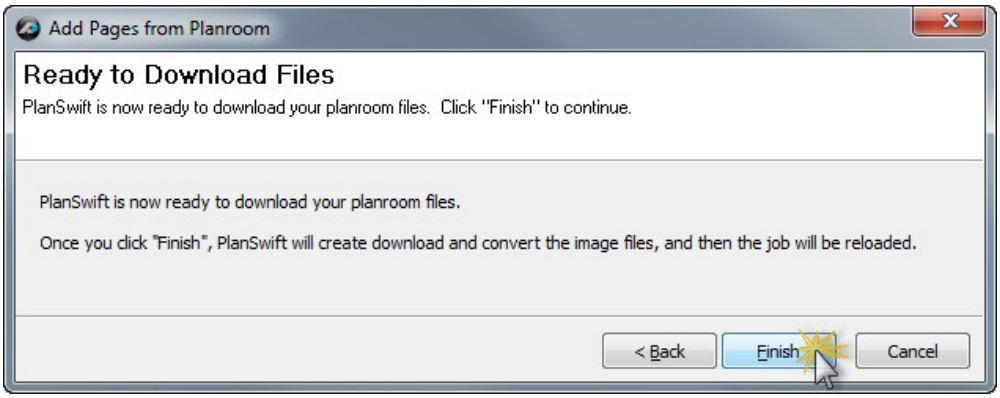

Add Pages from Planroom
Image Files
Select the image files for the digital plans that you want on this job.
Current Set
< Back
Next >
Cancel

4. Confirm the page converter settings are to your liking, if not adjust as needed.

5. Click 'Next' to continue.

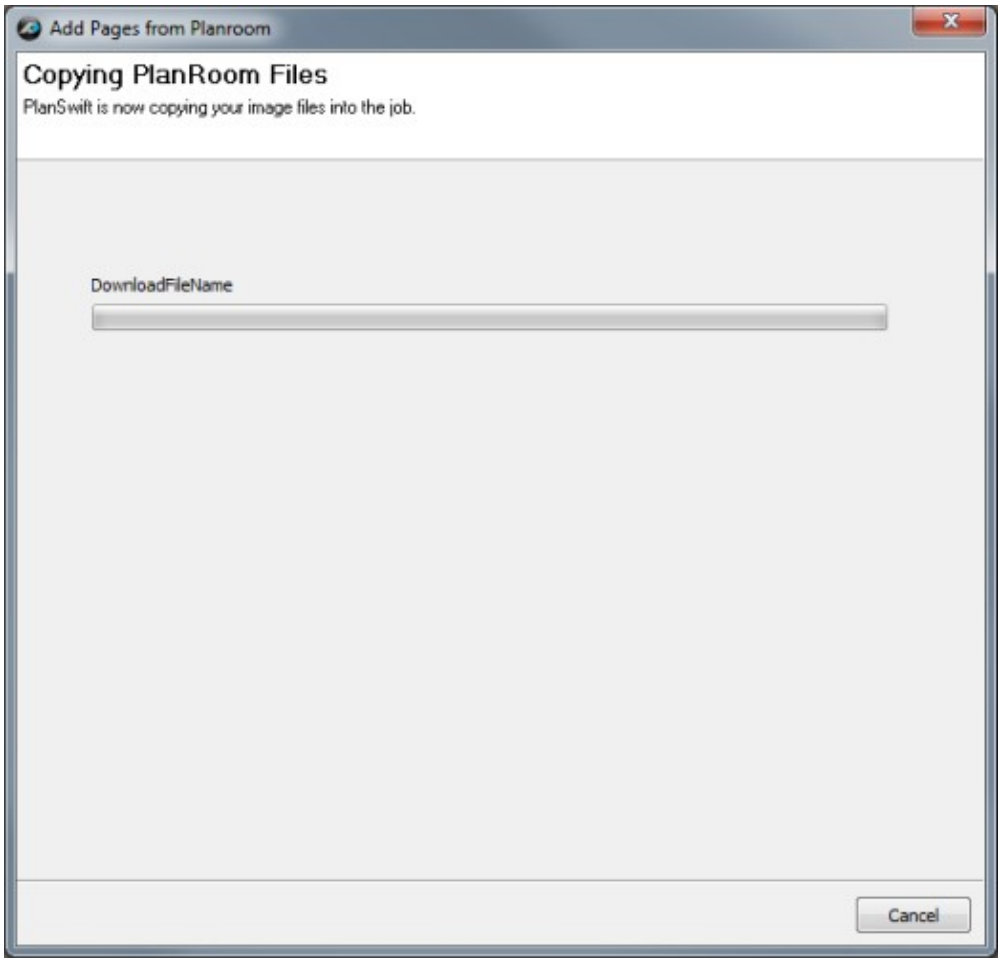

Add Pages from Planroom
Convert Settings
Select the settings for converting image files to be used by PlanSwift.
PDF
Convert PDF files to TIF
DPI for TIF Files:
200
Format:
Black & White
*note: Although PlanSwift will load PDF files, you may want to convert them to TIF for better performance.
Other Formats
Convert CPC files to TIF
Convert CAL files to TIF
Convert DJVU files to TIF
*note: PlanSwift will not be able to load these formats if they are not converted.
Multi-Page TIF
Split multi-page TIF files into seperate files.
*note: PlanSwift will only show the first image in multi-page TIF files if not split to seperate files.
Large TIF files
Downsize large TIF files.
< Back
Next >
Cancel

6. When ready click the 'Finish' button to download your planroom files.


Add Pages from Planroom
Ready to Download Files
PlanSwift is now ready to download your planroom files. Click "Finish" to continue.
PlanSwift is now ready to download your planroom files.
Once you click "Finish", PlanSwift will create download and convert the image files, and then the job will be reloaded.
< Back
Finish
Cancel

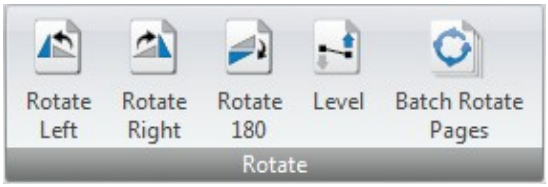
7. PlanSwift will download your files into the job. Depending on the number, size, and speed of your connection this may take some time.

8. When complete the window will close and you can start working with your new plans.



To watch the video about this topic, click here.

Page Rotate and Level Tools



Page Rotate and level tools allow you to change the orientation of pages.

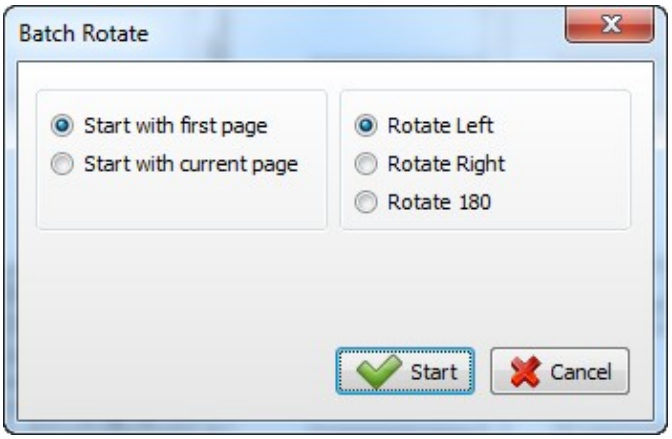
'Rotate Left' - Rotates the page counter-clockwise 90 degrees.

'Rotate Right' - Rotates the page clockwise 90 degrees.

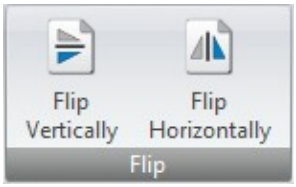
'Rotate 180' - Rotates the page a full 180 degrees.

'Level' - Allows you to select two point that should be on a horizontal or vertical line then PlanSwift will automatically level the page.

'Batch Rotate Pages' - PlanSwift will automatically rotate all pages in a job LEFT, RIGHT, or 180.



Page Flip Tool



The page flip tool allows you to flip the page you are working on.

'Flip Vertically' - Flips the page so the bottom is now at the top.

'Flip Horizontally' - Flips the page so the left side in now on the right.

Page Invert and Crop as New Page Tools

The Page Invert and Crop as New Page Image Tools allow you to easily update your job pages.

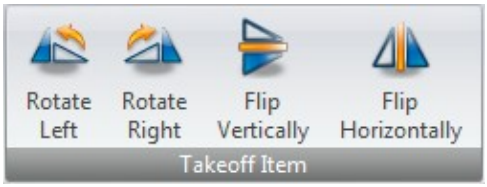
'Invert' - Inverts the black and white colors on a page so the areas that were black now will appear white.

'Crop as New Page' - Allows you to crop a page down in size and save it as a new page in the project all in one step.

Both of these tools are automatic when you select the button.

Other

Takeoff Item



The Digitizer Item buttons allow you to work with a selected digitizer area.

First you must select the digitizer area you wish to work with.

'Rotate Left' - Rotates the digitizer area count-clockwise.

'Rotate Right' - Rotates the digitizer area clockwise.

'Flip Vertically' - Flips the digitizer area so the bottom is now at the top.

'Flip Horizontally' - Flips the digitizer area so the left side is now on the right.

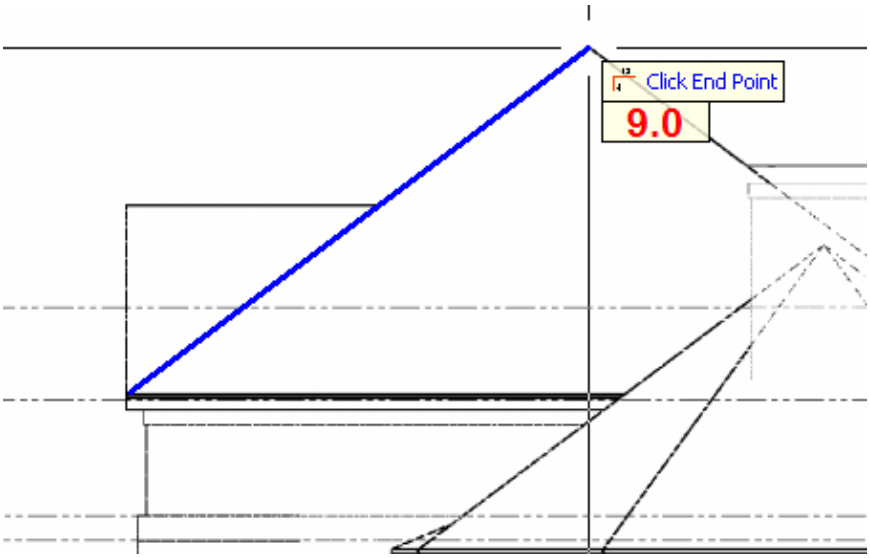
Pitch Calculation Tool

The Pitch tool allows you to find the pitch and angle of a slope.

1. Select the 'Pitch' button.

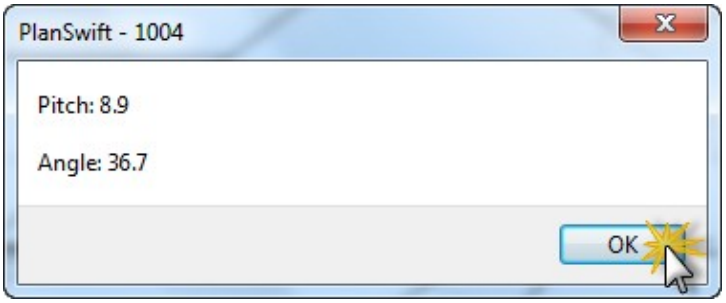
2. Click on the first point of the slope you want to measure.

3. Click on the second point of the slope.



4. A window will appear with the both the pitch and slope of the line you just made.

5. To close the box click the 'Ok' Button.



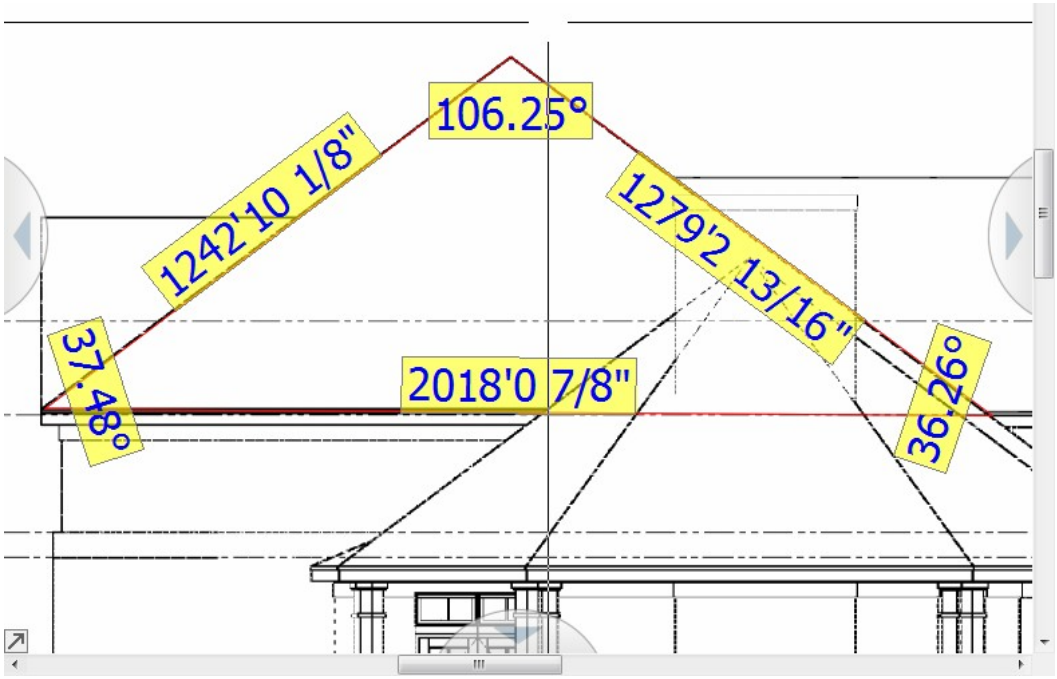
Triangulate Calculations Tool

The Triangulate tool allows you to measure the angles and side lengths of any triangle.

1. To use select the 'Triangulate' button.

2. Click on the three points of the triangle you want to measure.

3. The measurements will automatically be shown.



Also, you can use this tool to find an unknown dimension with two known points. To do this, click on the two known points and the unknown dimension. This will show you how far away the unknown dimension is from the two known points.

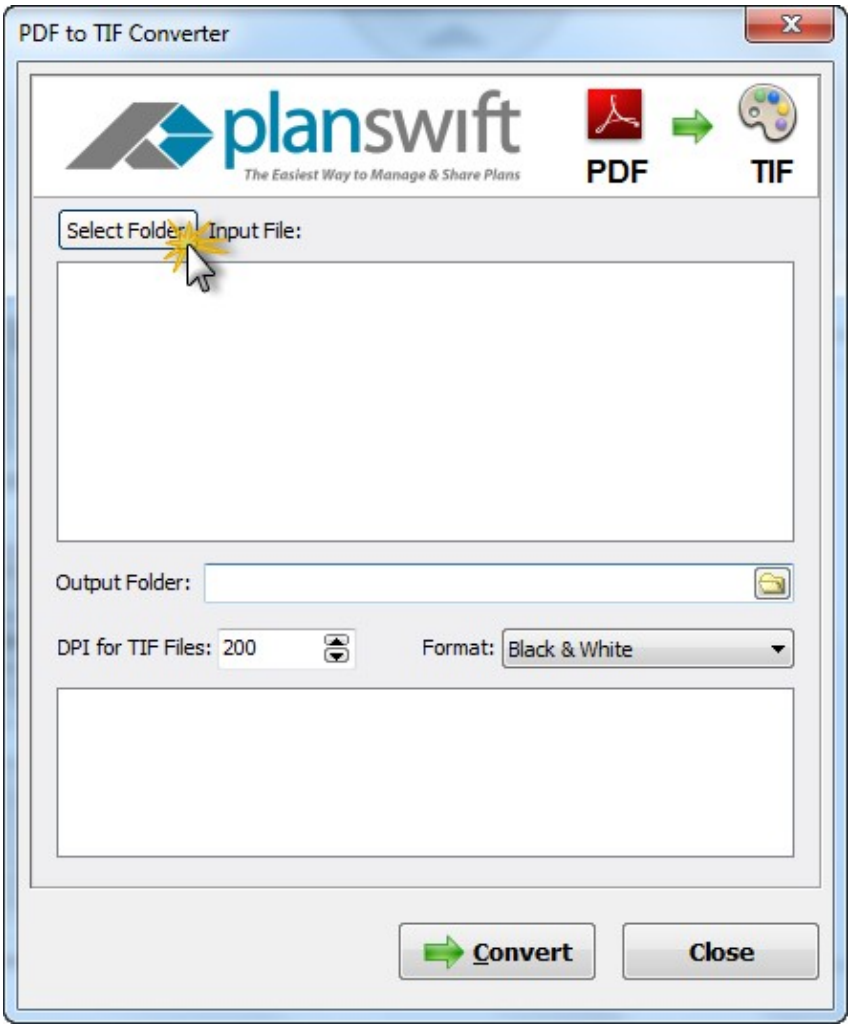
PDF to TIF Converter Tool

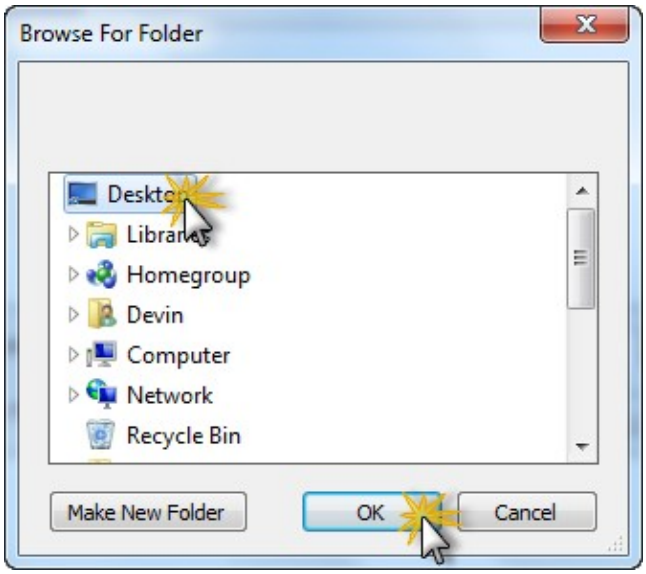
The PDF to TIF converter makes is easy to convert one or more PDF files into TIFs.

1. Select the 'PDF to TIF Converter' button.

2. Select 'Select Folder' to browse to the folder location containing your PDF plan files.

3. Select the folder then click 'Ok' to continue. (In this example the desktop location is used.)





4. PlanSwift will bring up a list of all PDF files in the selected file location.

5. Make sure the check box is selected for all the files you want to convert.

6. Confirm the Output Folder Location. PlanSwift defaults to the same location as the PDF files, however you may select any location you want.

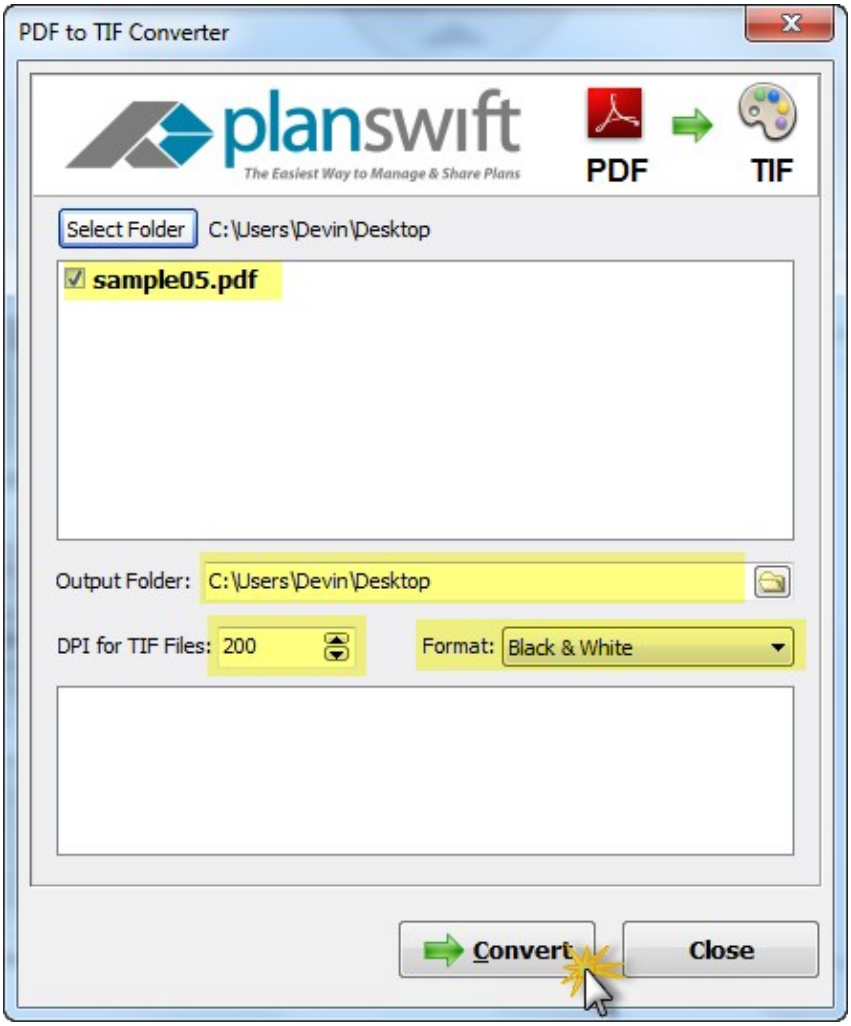
7. Select the DPI you want. The higher the number the greater the resolution will be, and the larger the file will be. Also the higher the number the longer the conversion will take.

8. Select the DPI and Format you want.

For most plans 200 DPI and Black & White will work well, but you can change the settings when you want a different result.

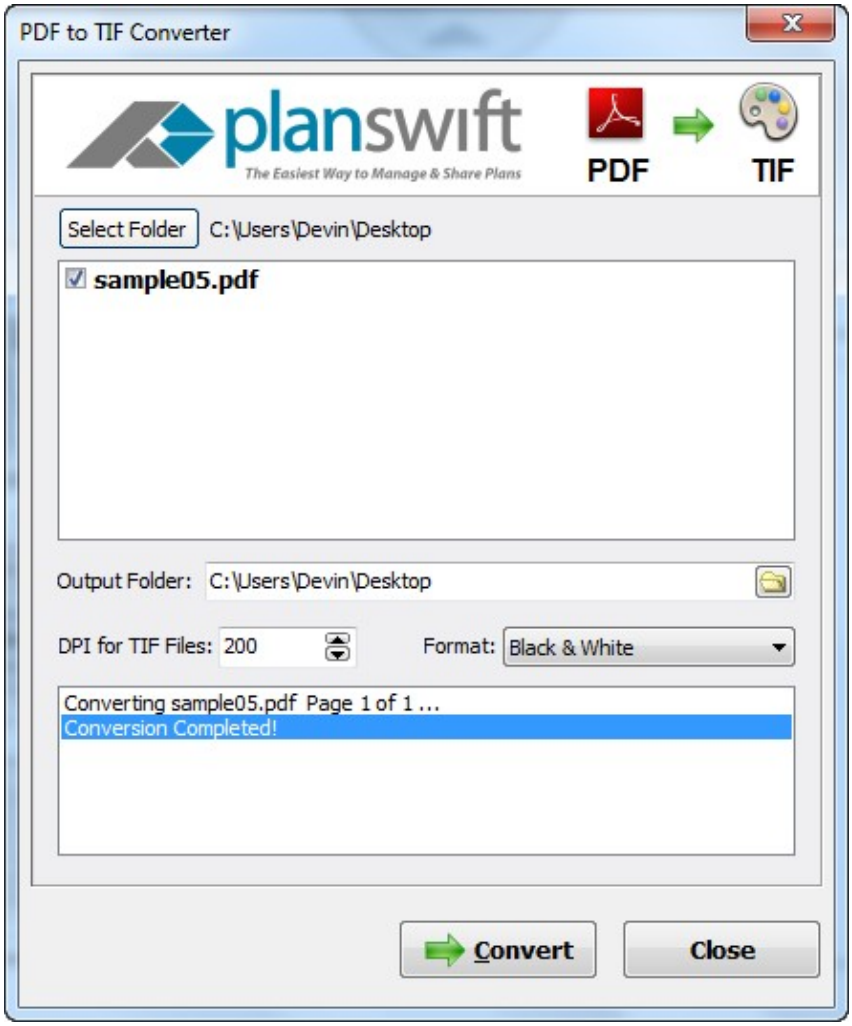
Please keep in mind the higher the DPI or the more gray-scale/color the option you select the larger your resulting file will be.

9. Select the 'Convert' button to start the conversion process.



10. PlanSwift will convert the files and show you the status of the operation. Depending on the number of files, plan size and options this may take several minutes.

11. When complete the Conversion Completed! measure will display and the TIF files will be in the selected location. Click the 'Close' button to close this menu.

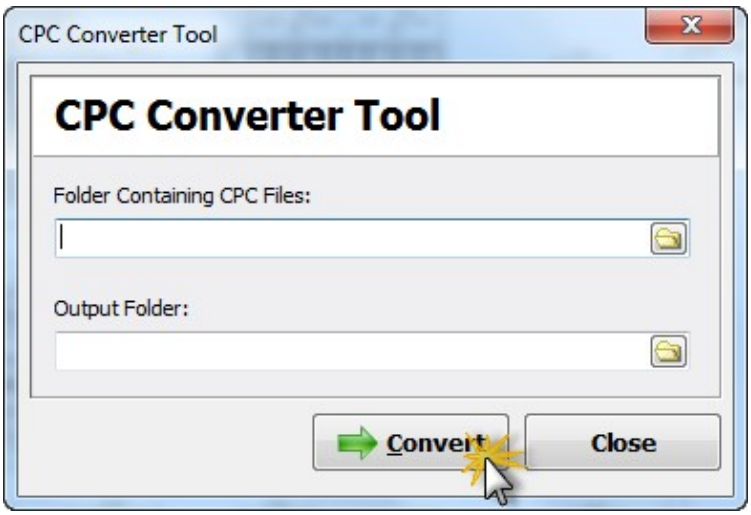

PDF to TIF Converter
planswift
The Easiest Way to Manage & Share Plans
PDF
TIF
Select Folder
C:\Users\Devin\Desktop
sample05.pdf
Output Folder:
C:\Users\Devin\Desktop
DPI for TIF Files:
200
Format:
Black & White
Converting sample05.pdf Page 1 of 1 ...
Conversion Completed!
Convert
Close

CPC to TIF Converter Tool

The CPC to TIF Converter tool allows you to convert CPC files into the TIF format.

1. Select the 'CPC to TIF Converter' button.

2. Enter or browse to the location containing the CPC files.
3. Enter or browse to the output converter output location.
4. Click the 'Convert' button to start the process.

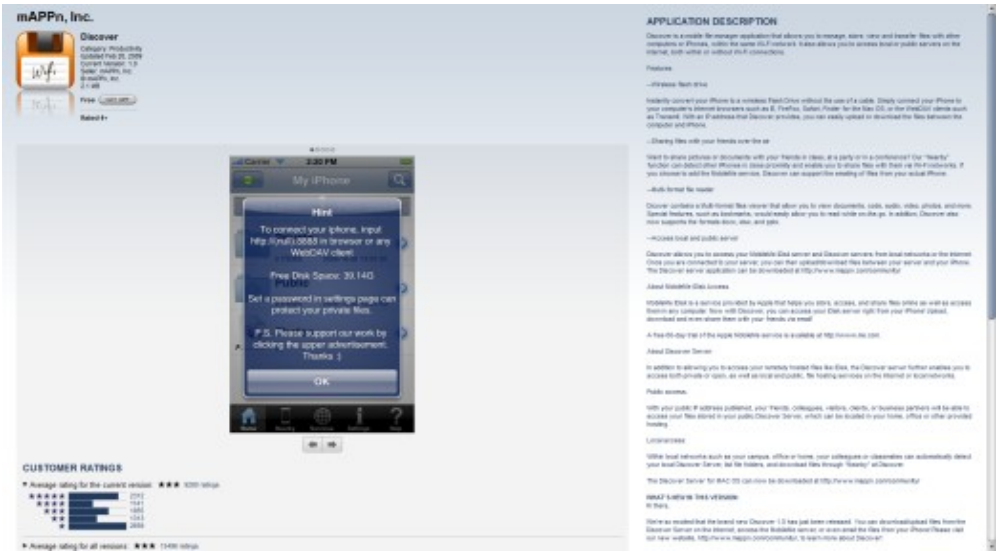


5. When PlanSwift is complete select 'Close' to close the tool.

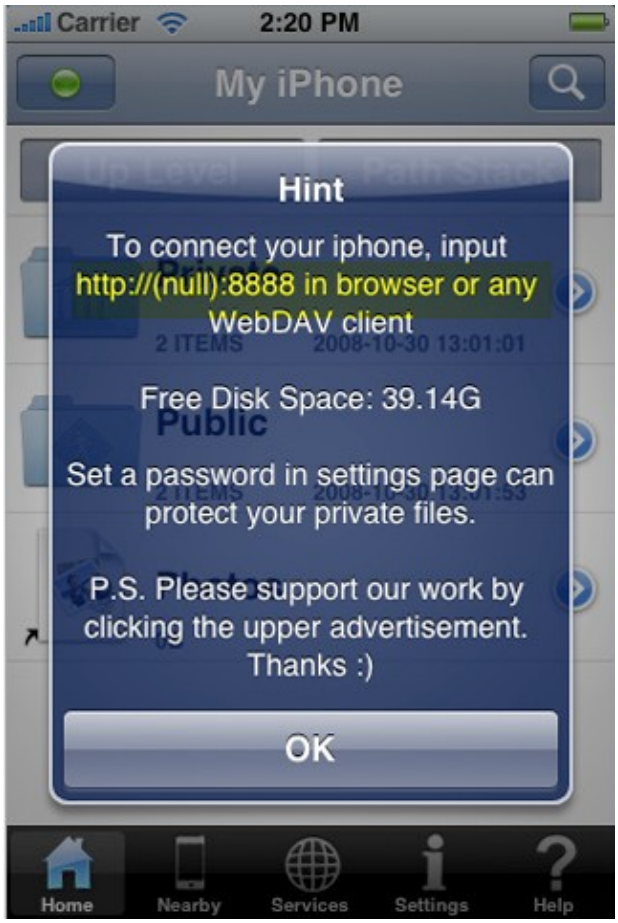
Download to Mobile Device

PlanSwift makes it easy for you to download your plans to your mobile device allowing you to take your plans with you when away from your computer.

To do this you will need a wireless connection and the Discover app from mAPPn, Inc.

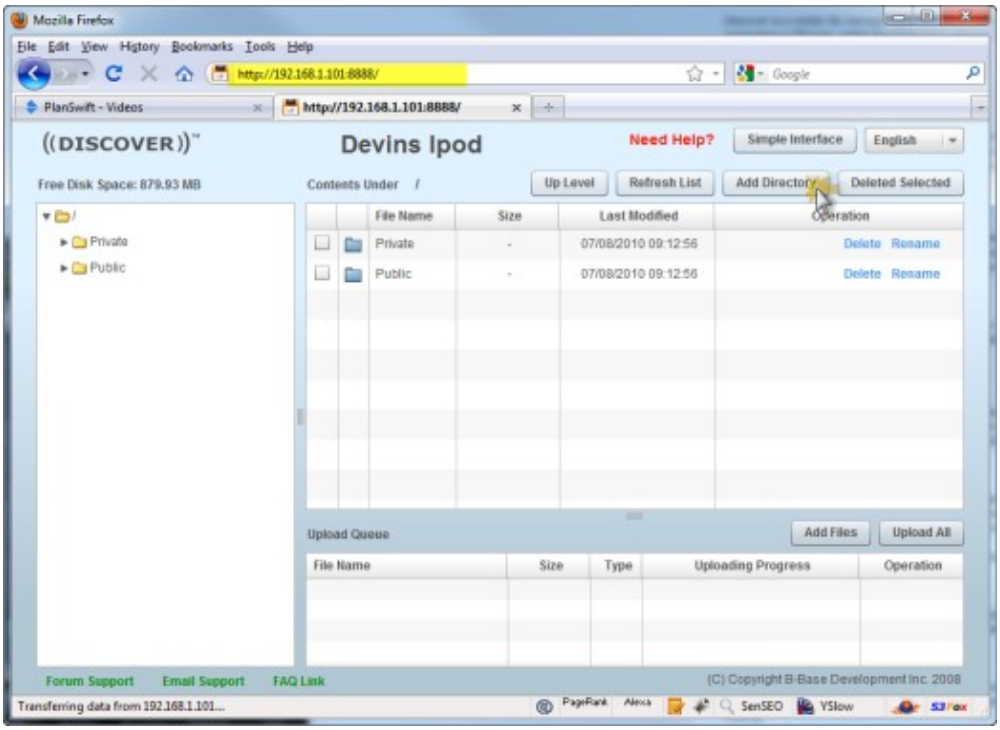


1. Run the Discover app on you device you will need to copy the IP address from the Hint page. The Hint page come up when you start the app or by selecting the Green Dot button.



2. Copy the Device IP address into your web browser.

3. Click the 'Add Directories' button to add a PlanSwift directory.



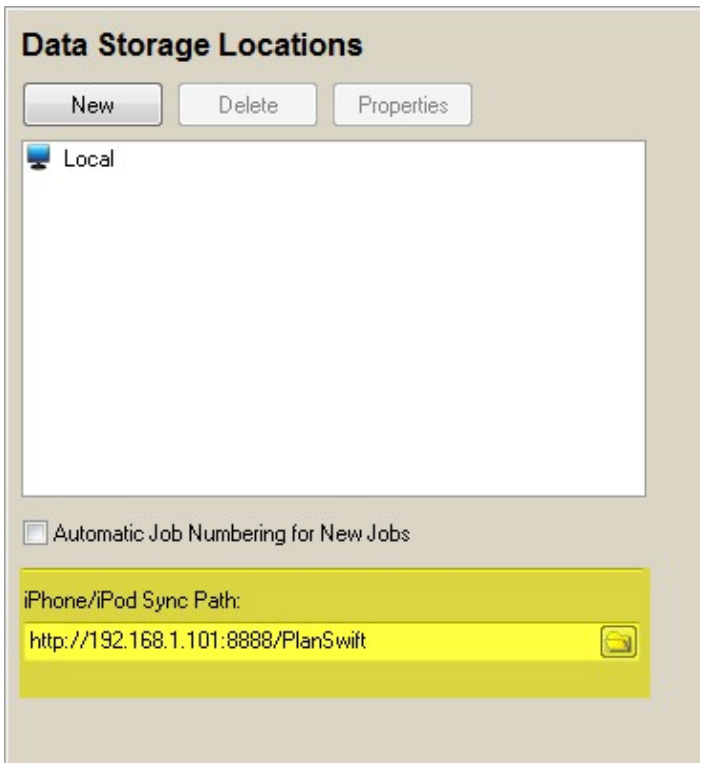
4. Enter the Directory name.

5. Click the 'Accept' button to create the directory.

6. Confirm the new directory has been added.

6. Add the iPhone/iPod IP address to PlanSwift. This is done under the 'Settings' tab, Data Storage Locations.

Make sure to include the directory name in the path.



7. Select the 'Download to Mobile Device' button.

8. Select the pages to be downloaded by selecting the check box.

'Select All' - Will select all the pages in the current job.

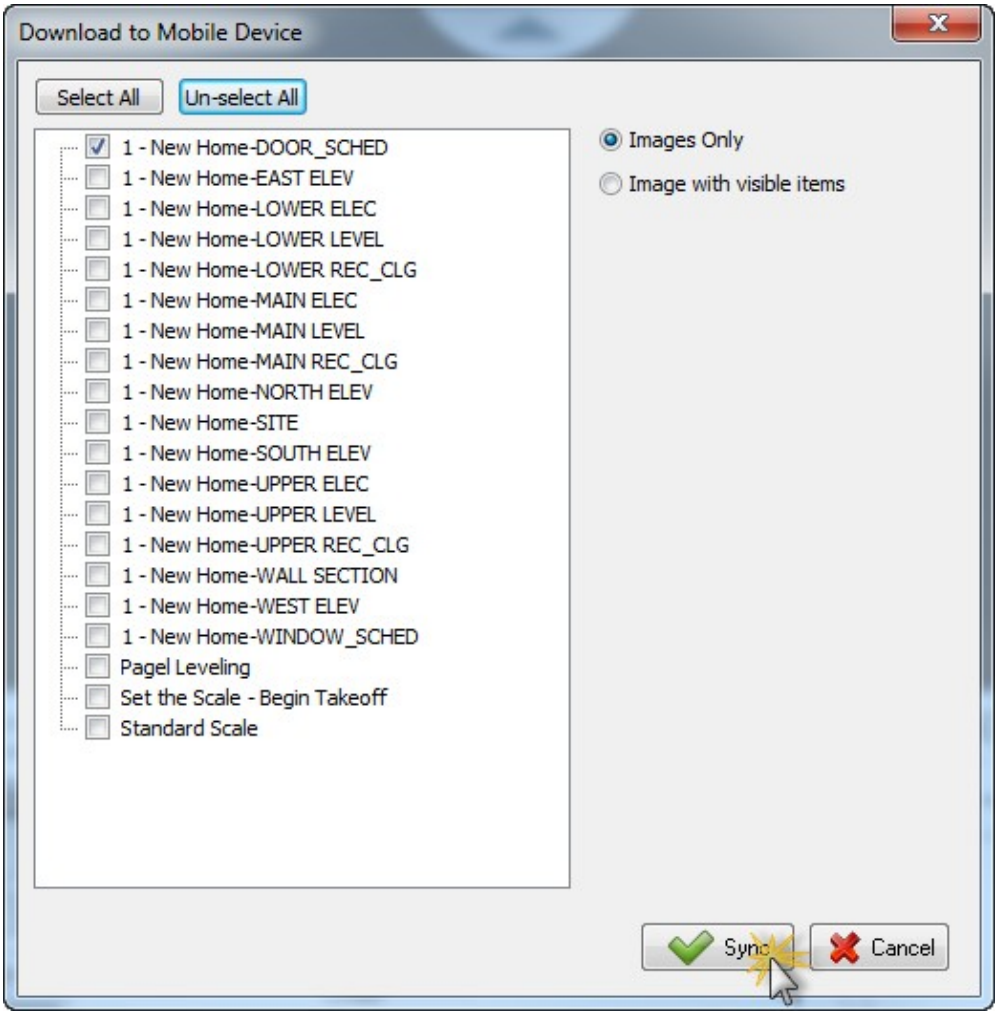
'Un-select All' - Will un-select all the pages in the current job.

9. Select the Image information to downloaded.

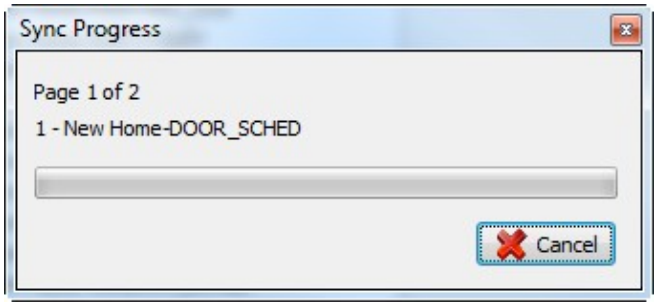
Images Only - Downloads only the page images **without** any items you have added.

Images with visible items - Downloads the pages **with only** the items you have selected as visible on the page. Invisible items will not be downloaded.

10. Click 'Sync' to download the pages to your device.


Download to Mobile Device
Select All
Un-select All
1 - New Home-DOOR_SCHED
1 - New Home-EAST ELEV
1 - New Home-LOWER ELEC
1 - New Home-LOWER LEVEL
1 - New Home-LOWER REC_CLG
1 - New Home-MAIN ELEC
1 - New Home-MAIN LEVEL
1 - New Home-MAIN REC_CLG
1 - New Home-NORTH ELEV
1 - New Home-SITE
1 - New Home-SOUTH ELEV
1 - New Home-UPPER ELEC
1 - New Home-UPPER LEVEL
1 - New Home-UPPER REC_CLG
1 - New Home-WALL SECTION
1 - New Home-WEST ELEV
1 - New Home-WINDOW_SCHED
Pagel Leveling
Set the Scale - Begin Takeoff
Standard Scale
Images Only
Image with visible items
Sync
Cancel

PlanSwift will show you the progress of your download. Depending on the size of your download and speed of your connection this could take some time.



11. Open the Discover app on your iPhone/iPod and navigate to the PlanSwift directory. There you will find the plans you have downloaded.

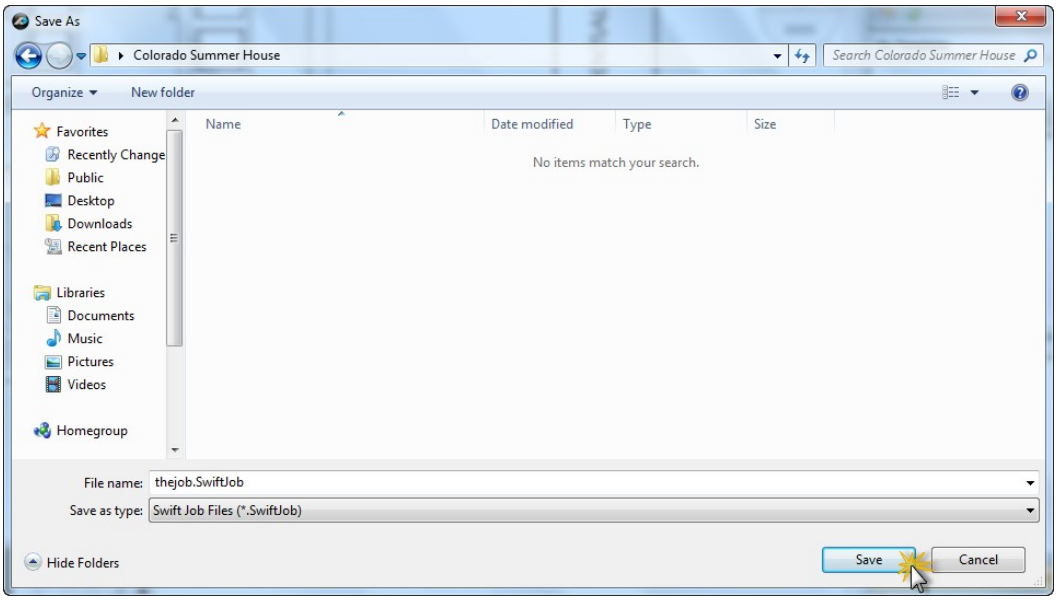
Zip SwiftJob Tool

The Zip SwiftJob tool allows you to condense a job in PlanSwift for easy sending or storage.

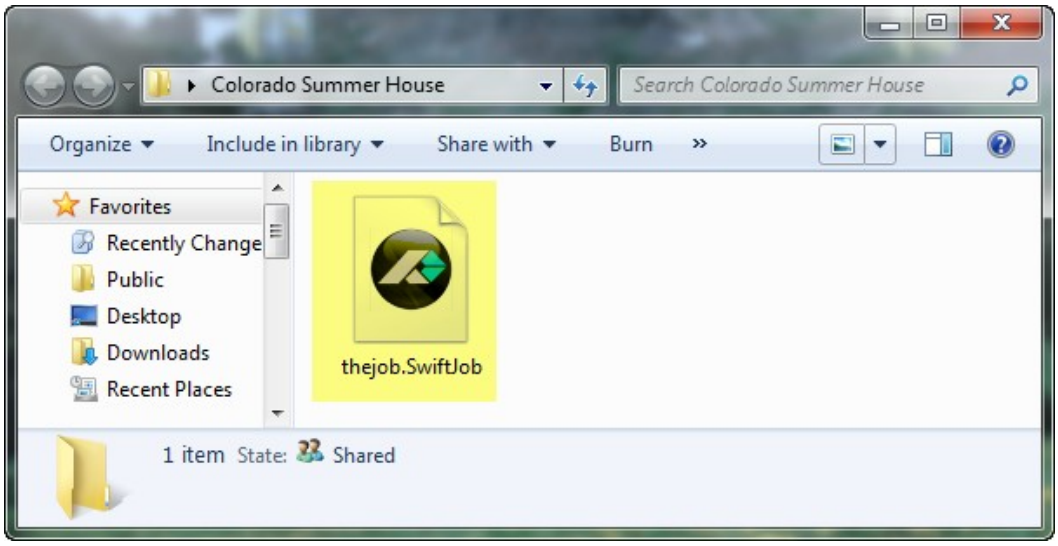
1. Select the 'Zip SwiftJob' tool button.

2. Select the location you want to save the zipped job into.

3. Select 'Save' to start the process. The window will close automatically when the job is done.



Here is a sample of what a Zipped SwiftJob will look like.


Colorado Summer House
Search Colorado Summer House
Organize
Include in library
Share with
Burn
Favorites
Recently Change
Public
Desktop
Downloads
Recent Places
thejob.SwiftJob
1 item State: Shared

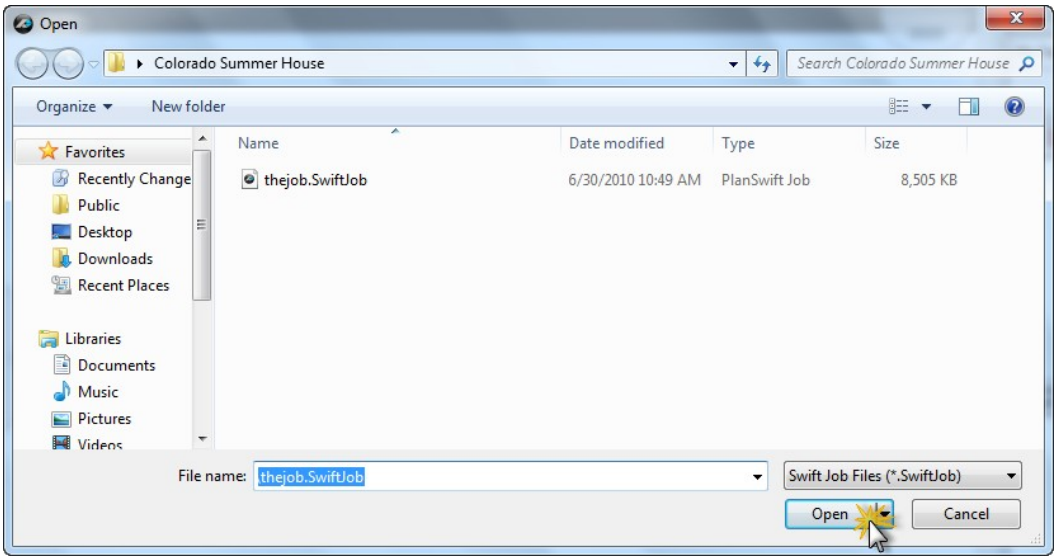
Unzip SwiftJob Tool

The Unzip SwiftJob Tool allows you to unzip a SwiftJob files onto your computer.

1. Select the 'Unzip SwiftJob' button.

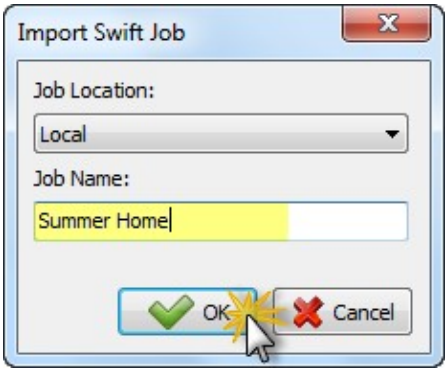
2. Select the SwiftJob file you want to open.

3. Click the 'Open' Button to continue.



4. Select the Location to store the job and the Job Name.

5. Click 'Ok' and PlanSwift is unzip the SwiftJob file so you can open and use it.



Save Screenshot Tool

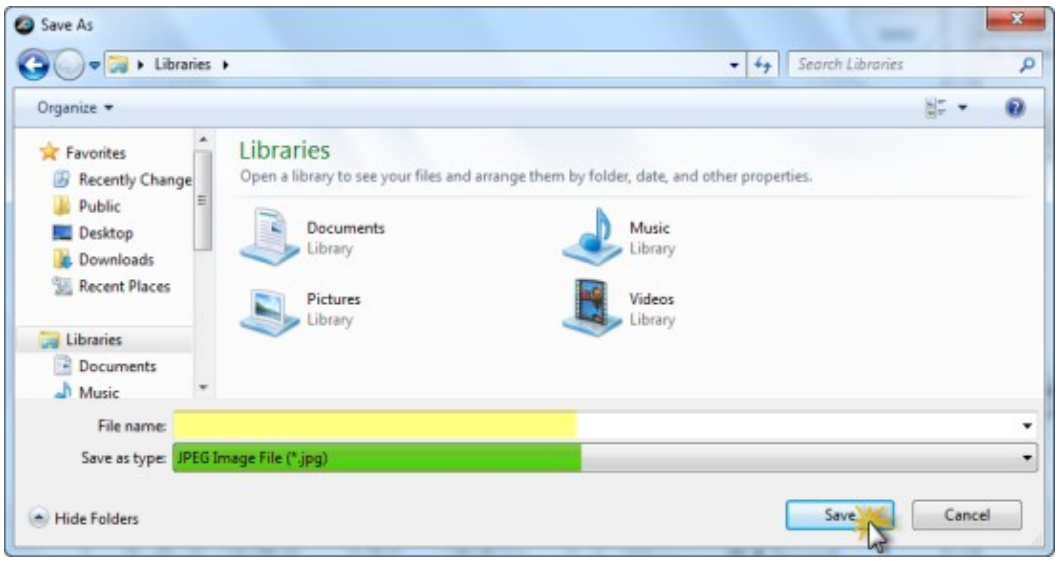
The Save Screenshot tool allows you to capture and save an image screenshot for later use.

1. Select the 'Save Screenshot' button.

2. Enter or browse to the location you want to save the screenshot to.

3. Select the file type you want. You can select from the most common types jpg, jpeg, tif, or bmp.

4. Click the 'Save' button to save the screenshot. The window will automatically close when the process is complete.



View

Show/Hide Option Buttons

'Show Labels' - Displays labels on the page.

'Hide Labels' - Hides labels on the page from view.

'Show Digitizer Items' - Shows items used by the digitizer.

'Hide Digitizer Items' - Hides from view the items used by the digitizer.

'Show Overlays' - Displays plan page overlays.

'Hide Overlays' - Removed overlay page from view.

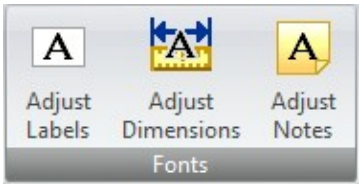
'Show Dimensions' - Displays dimensions on the page.

'Hide Dimensions' - Hides from view dimensions on the page.

'Show Notes' - Displays notes on the page.

'Hide Notes' - Hides from view notes on the page.

Font Adjust Buttons



These button allow you to adjust the font, height, colors and transparency of fonts on your job pages.

'Font' - Select the font style you want to use.

'Height' - Select the font height.

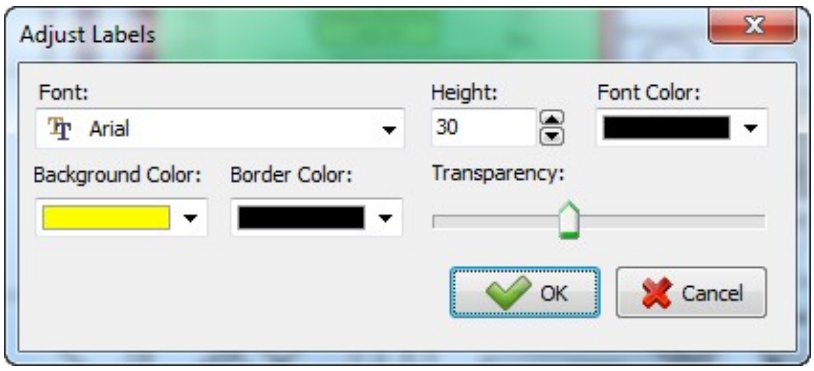
'Font Color' - Select the color the font will be.

'Background Color' - Select the color to use as background.

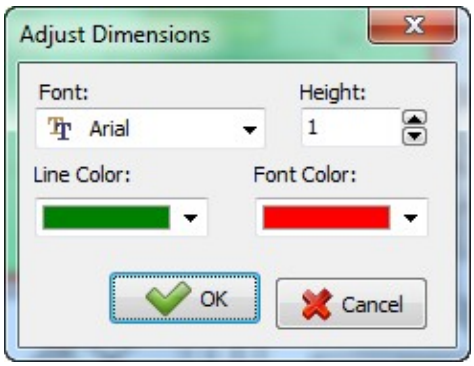
'Transparency' - Set the amount of transparency the font will have when available.

When done click the 'OK' button to activate the settings.

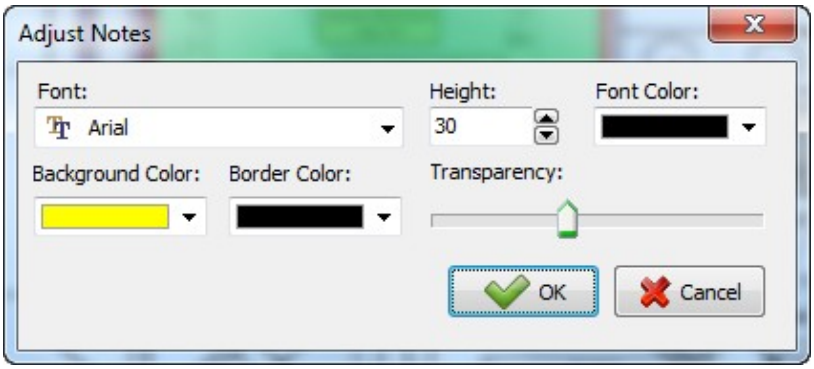
'Adjust Labels'



'Adjust Dimensions'



'Adjust Notes'


Adjust Notes
Font:
Arial
Height:
30
Font Color:
Background Color:
Border Color:
Transparency:
OK
Cancel

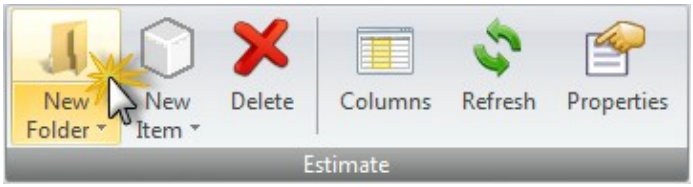
Estimating

Estimate New Folder

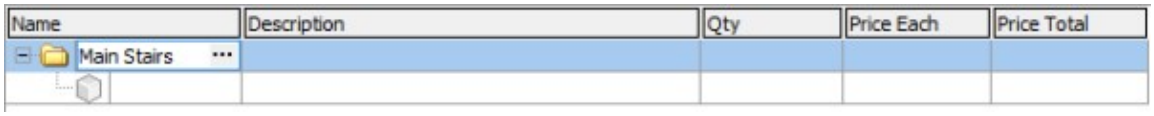
Folders can be a great way to divide estimating items into meaningful groups.

The 'New Folder' button allows you to add a new folder to your estimate, or if you select the lower portion you can add a new sub-folder.

1. Select the 'New Folder' button to begin.



2. You can update the information about the folder directly directly on the estimate table by selecting the square you wish.



You can click the 'New Folder' button as many times as you would like, adding a new folder/sub-folder each time.

Estimate New Item

The 'New Item' button allows you to add a new item or material to your estimate. By selecting the bottom portion of the button you can add a new sub-item.

1. Select the 'New Item' button.

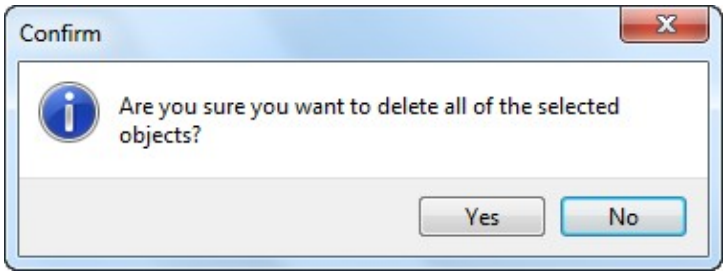
2. You can update information about the item directly on the estimate table by selecting the cell you want.

Estimate Folder and Item Delete

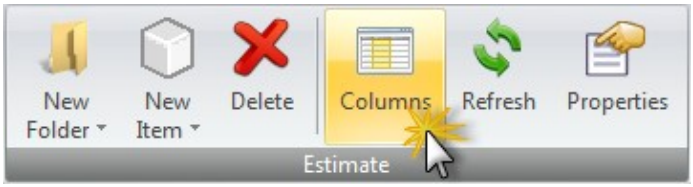
The 'Delete' button in the estimating tab allow you to delete a folder or item.

1. Select the 'Delete' button.

2. You must confirm you want to delete before it will take effect.

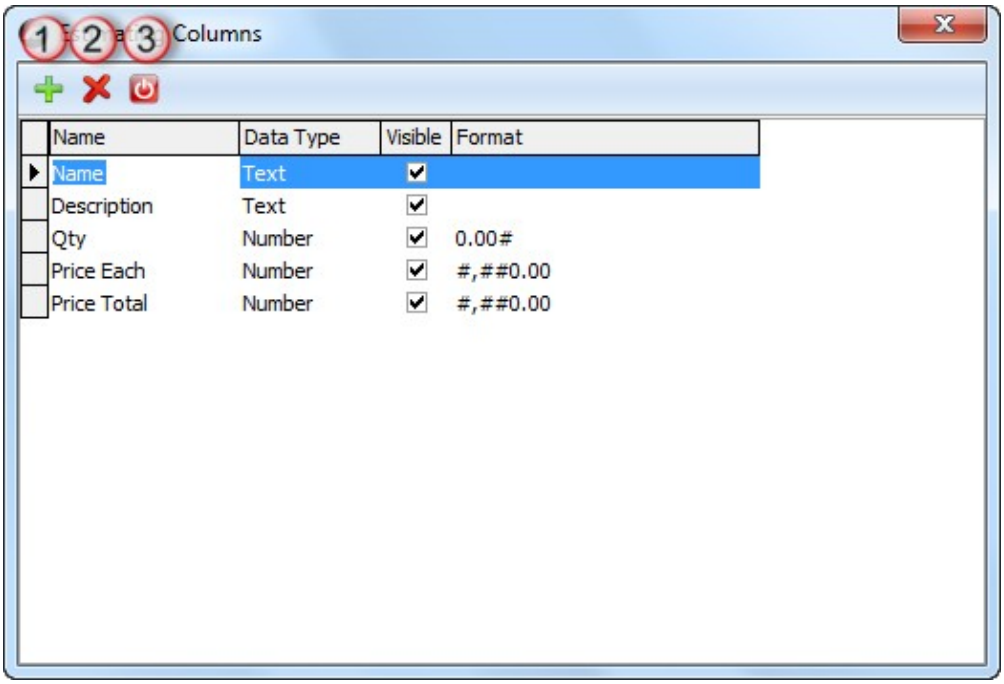


Estimating Columns Options



The 'Column' button allows you to update, add and delete columns on your estimating form.

1. Select the 'Column' button to open the Estimate Columns dialog box.



You can make changes or update directly on the form. Select the item you would like to update and change the information.

To add a column select the plus (1) then enter your information about the column.

To delete a column select the column then select the x (2). The column will be removed from the estimating table.

To close the dialog box select the close button (3). Your changes will be saved and will take effect.

Name - Use this column to give your estimate column a descriptive name.

Date Type - Select the type of data that will be found in this column.

Text - Allows Alphanumeric characters such as letter, numbers, and characters.

Number - Allow number to be input into the cell.

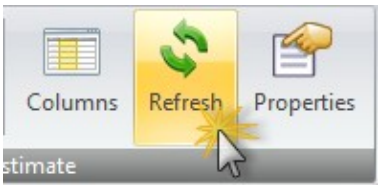
Check box - Creates the cell as a check box allowing a Yes/No selection.

Visible - Do you want the Column to be visible or not visible.

Format - Allows you to set how the column contents are formatted and the number of decimal points displayed.

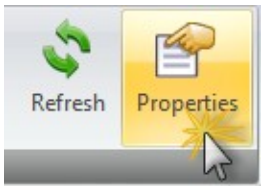
Estimate and Templates Refresh Button

Use the 'Refresh' button to refresh the screen and estimating numbers with any updates you may have made.

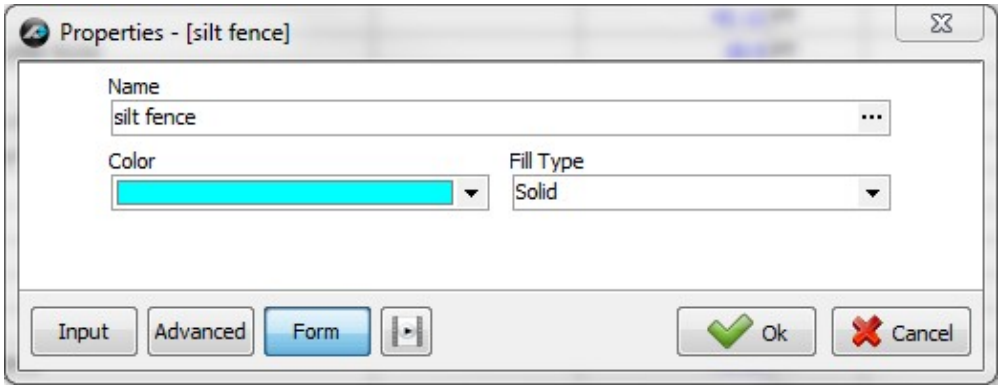


Estimate and Templates Column Properties

The 'Properties' button allows you to change, add, or delete estimate column properties, including adding formulas and advance items.



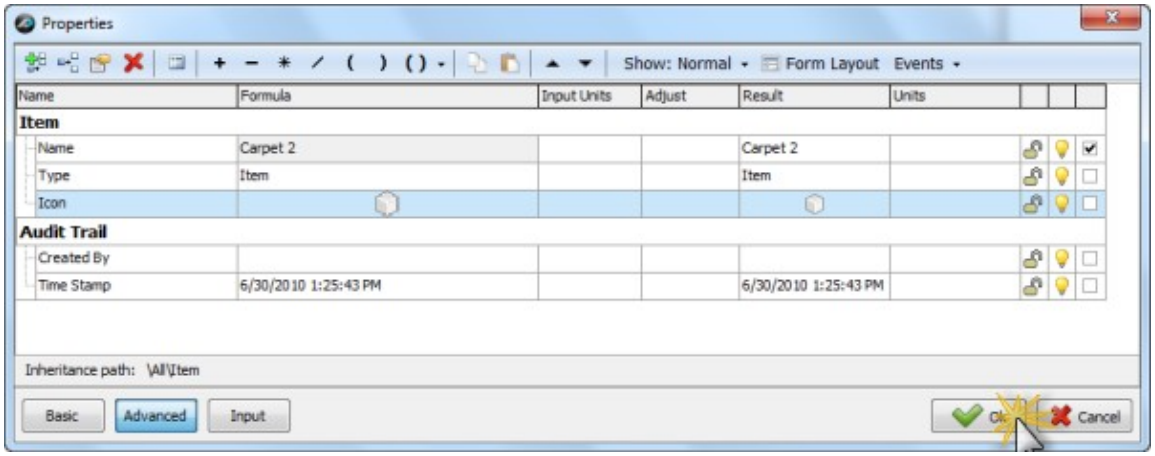
The Form window allows you to change the name of the column.



To make greater changes select the Advanced button.

In the advanced window you can make any change you would want. You can update information, add formulas, and see when the column was changed.

When done click the 'Ok' button to close the window.



Copy and Paste Buttons

'Copy' - Copies the selected information to your clipboard.

'Paste' - Copies estimate information from your clipboard.

Estimate and Template Adjust Buttons

The 'Adjust' buttons allow you to quickly change the level and sub-level of columns in your estimates.

'Up Arrow' - Moves the selected column up one level.

'Down Arrow' - Moves the selected column down one level.

'Left Arrow' - Moves the selected column up one sub-level.

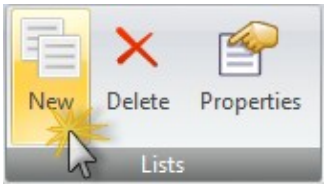
'Right Arrow' - Moves the selected column down one sub-level.

Lists

New List

Lists allow you to create drop down menus for lists of items you need to enter repetitively (i.e. stud sizes).

1. Select the 'New' list button



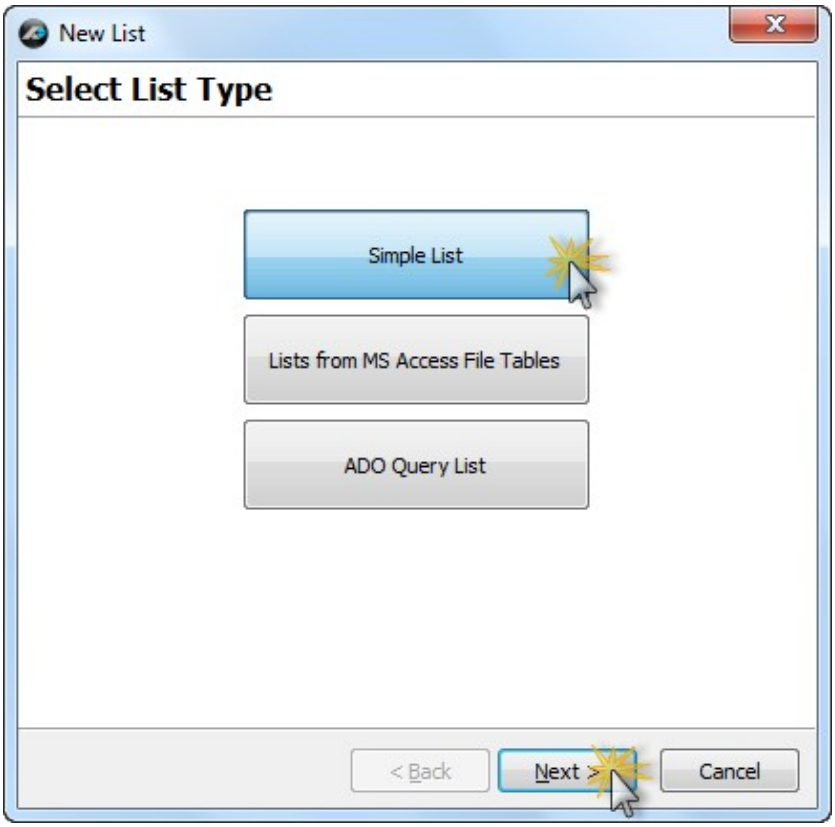
2. Select the type of list.

Simple List - You will input the list option.

List from MS Access File Tables - List choices will come from a Microsoft Access database.

ADO Query List - List choices will come from a query list.

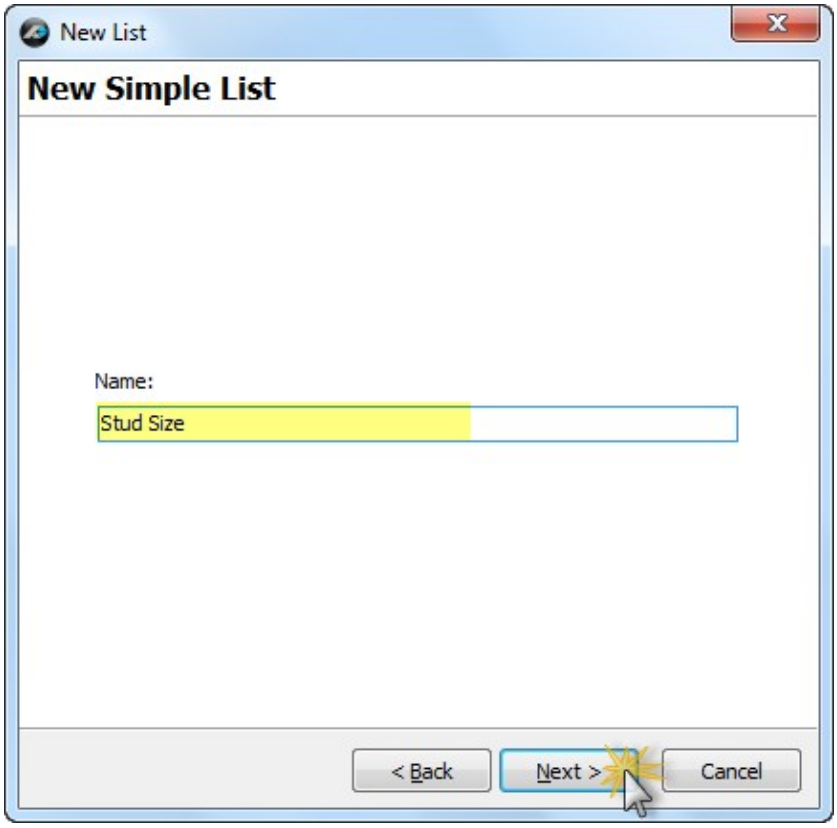
3. Select 'Next' to continue.



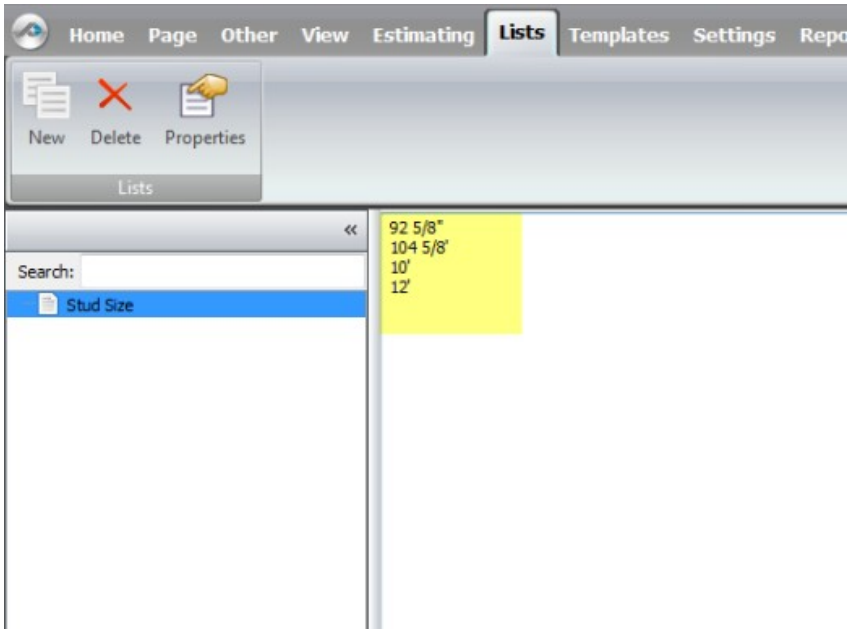
Simple List

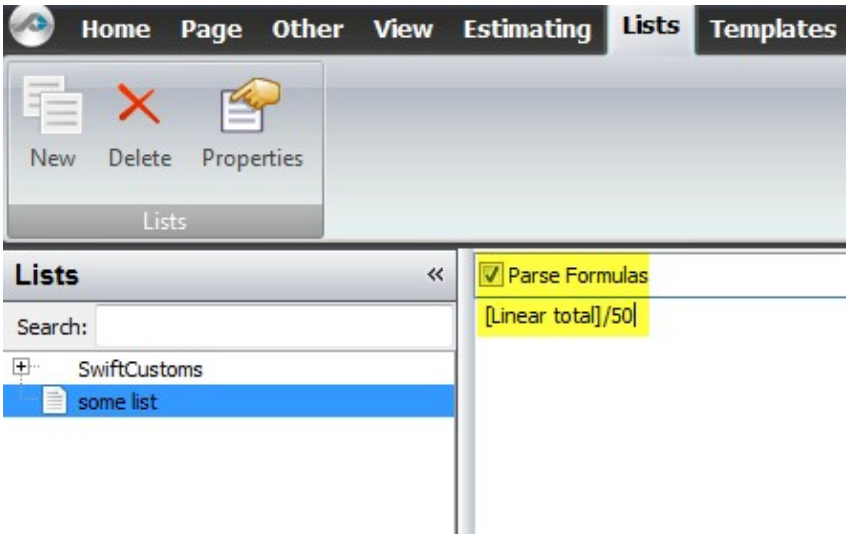
4. Enter the Name for the List, this is the name you will use in item Properties.

5. Click 'Next' to continue.



6. Enter the values you want in the drop-down list. Your list will be saved and available to you when you are done entering choices. If you are using formulas you must check the Parse Formulas box as in the second image.

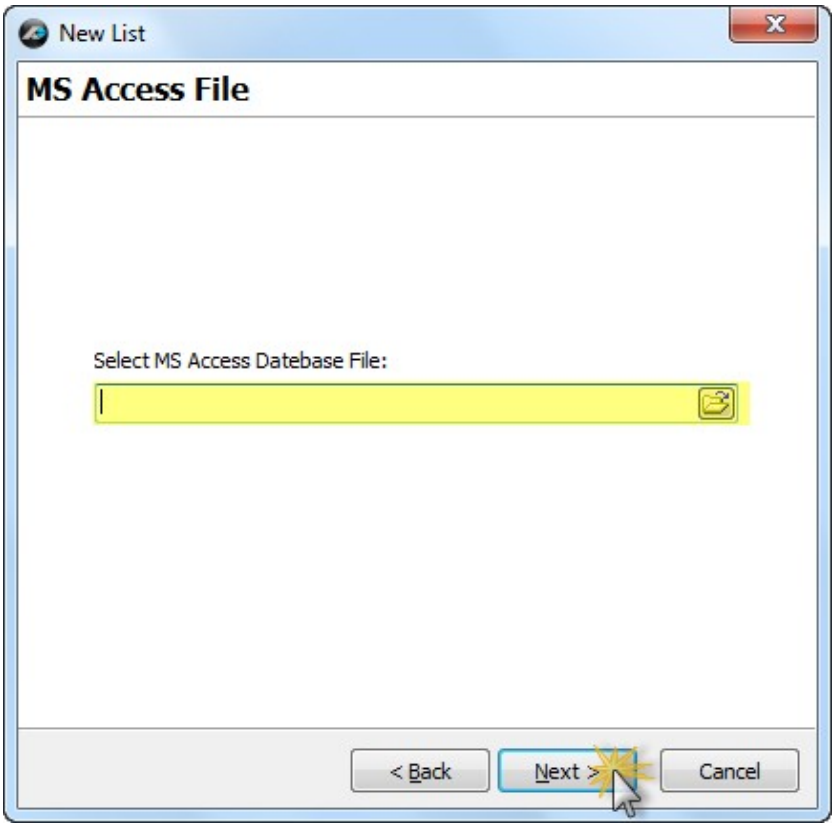




MS Access File Table

4. Enter or navigate to the file containing the database.

5. Click 'Next' to continue. All the tables from the database will be made available as a list selection.

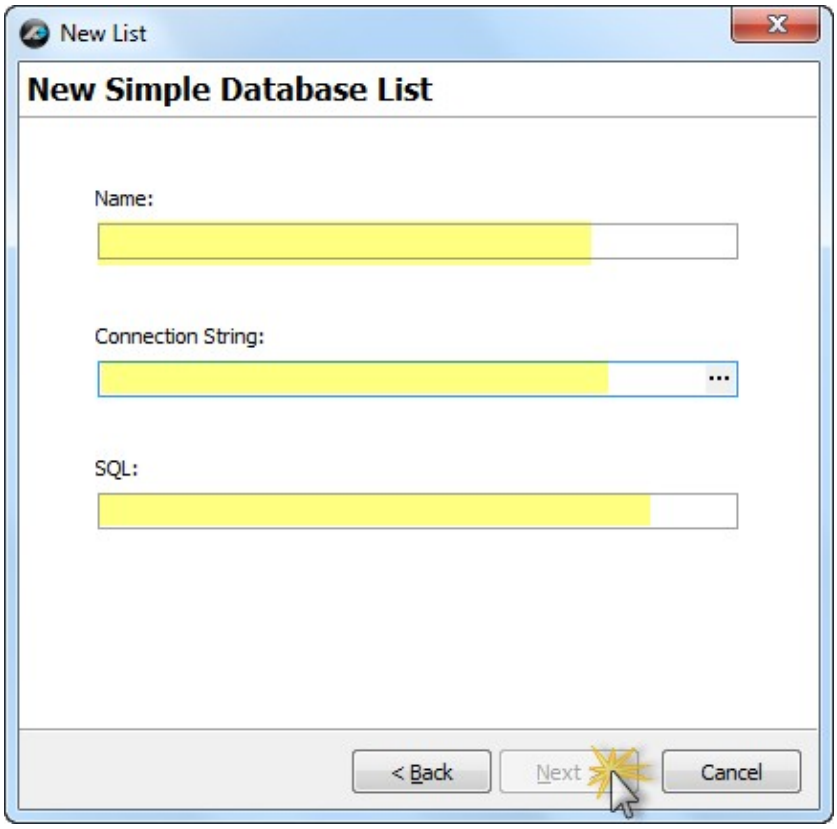


ADO Query List

4. Enter the name you want to use to reference this database, this is the name you will use in properties later.

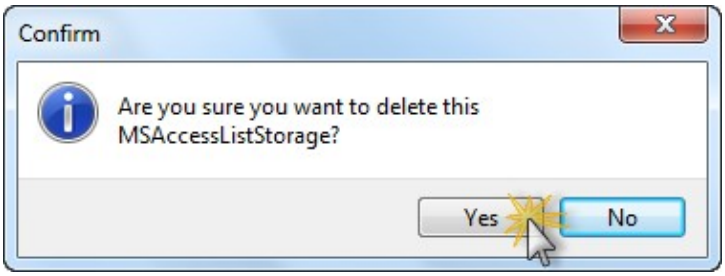
5. Enter the Connection String and SQL.

6. Click the 'Next' button to complete the database connection.


New List
New Simple Database List
Name:
Connection String:
SQL:
< Back
Next
Cancel

List Delete

The 'Delete' button allows you to delete lists you have made. You will be required to confirm you choice before the deletion will take effect.



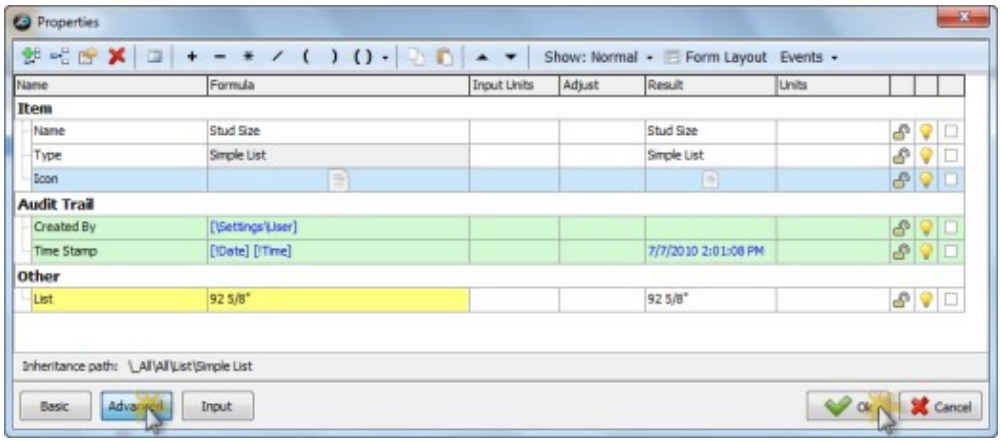
List Properties

The list Properties button gives you access to the many property of the selected list.

1. Select the 'Properties' button.

2. From the list properties window you can view and change many of the properties of the list. By selecting the List row you can add, change and delete list choices.

3. When finished click the 'OK' button to close the window.

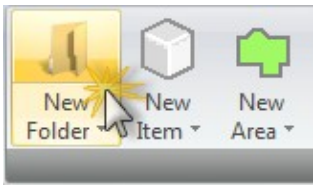


Templates

Template New Folder or Sub-Folder

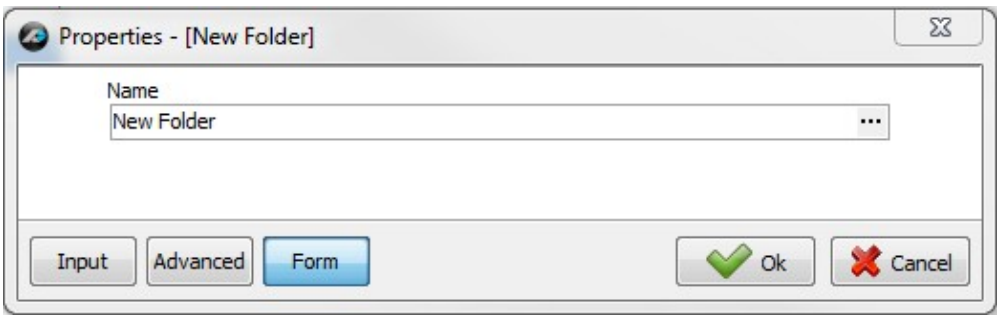
Folders are a great way to arrange and organize your information.

1. To create a New Template Folder select the 'New Folder' button. If you would like to create a sub-folder select the lower portion of the button.



2. The 'Form' folder option allows you to enter a folder name.

3. When done click the 'OK' button to continue, you have created a new folder for your use.



4. The 'Advanced' folder option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Other - Other folder properties grouped together for easy reference.

Icon - This is the Icon used to display the folder.

Item - Properties related to the folder.

Name - This is the descriptive name for the folder.

Type - Type of folder.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the folder.

Time Stamp - Date and Time the Folder was updated.

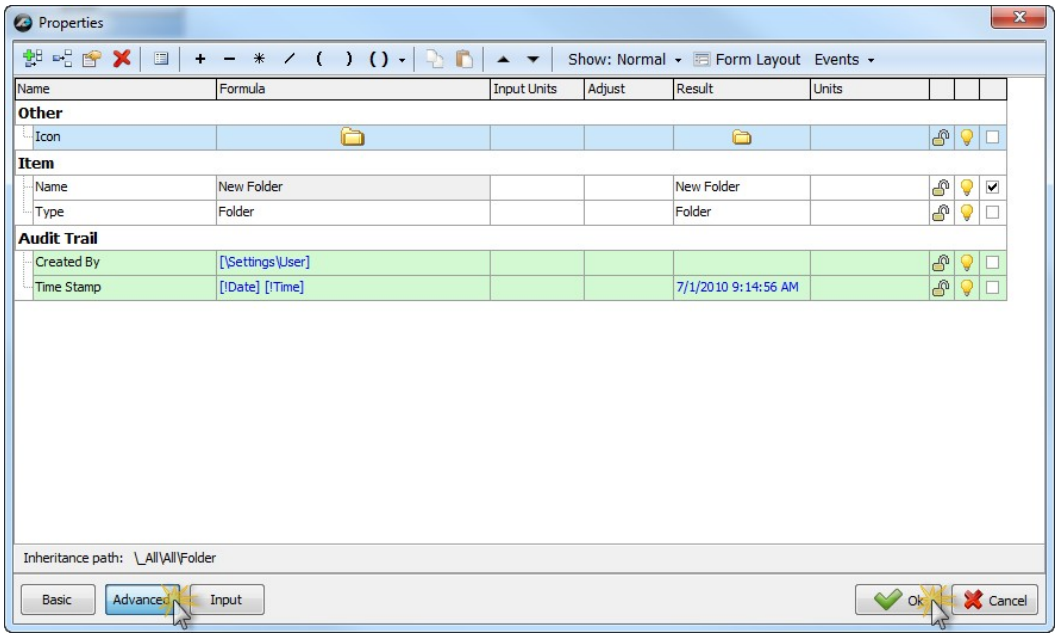
Padlock - Allows you to lock and unlock the contents of that row. Clicking in the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

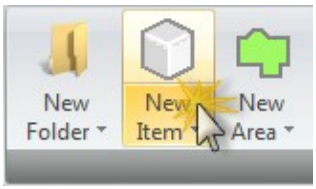
Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a new folder for your use.



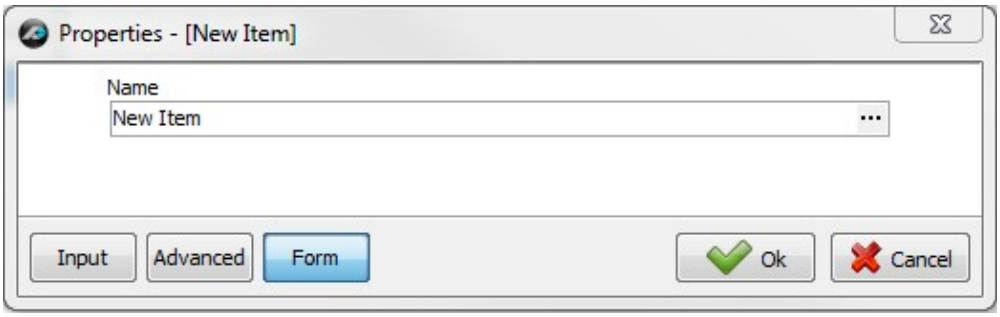
Template New Item or Sub-Item

1. To create a New Template Item select the 'New Item' button. If you would like to create a sub-item select the lower portion of the button.



2. The 'Form' item option allows you to enter an item name.

3. When done click 'OK' button to continue, you have created a new item for your use.



4. The 'Advanced' folder option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Item - Properties related to the folder.

Name - This is the descriptive name for the folder.

Type - Type of folder.

Other - Other folder properties grouped together for easy reference.

Icon - This is the Icon used to display the folder.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the object. (This information requires that the User Name be added in the settings under Company.)

Time Stamp - Date and Time the Folder was updated.

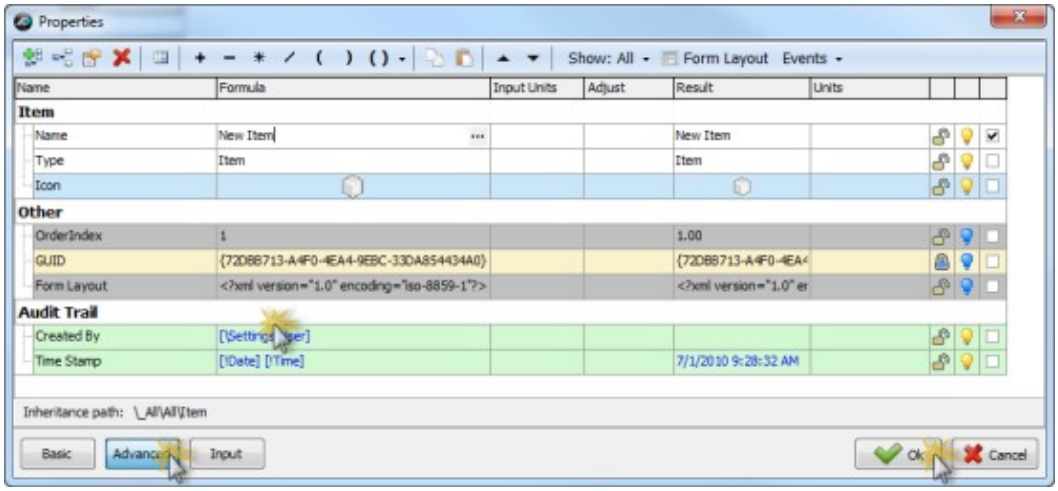
Padlock - Allows you to lock and unlock the contents of that row. Clicking in the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a new item for your use.



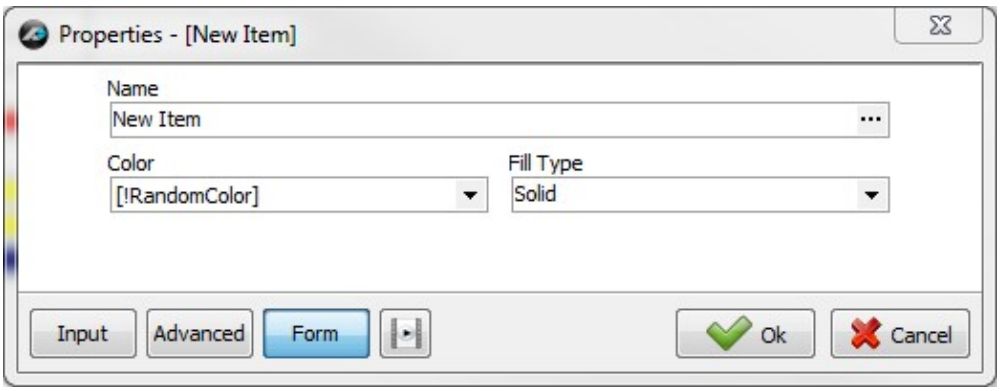
Template New Area or Sub-Item Area

From within the Templates tab you can create Areas for use in estimating and takeoff before you need then, or export/import them into jobs.

1. To create a new area select the 'New Area' button, to create a new sub-item area select the lower portion of the button.

2 The 'Form' properties window allows you to name your area, set the color, fill type and location.

3. When finished click the 'OK' button to continue, you have created a new area for your use.



4. The 'Advanced' Area option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Estimating - This section allows you to estimate, set formulas and equation for estimating and define other area estimating rules for use later.

Item - This section allows you to set general information about the template area including the name and the area type.

Other - Under this section you can set some of the action the area will handle.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the folder.

Time Stamp - Date and Time the Folder was updated.

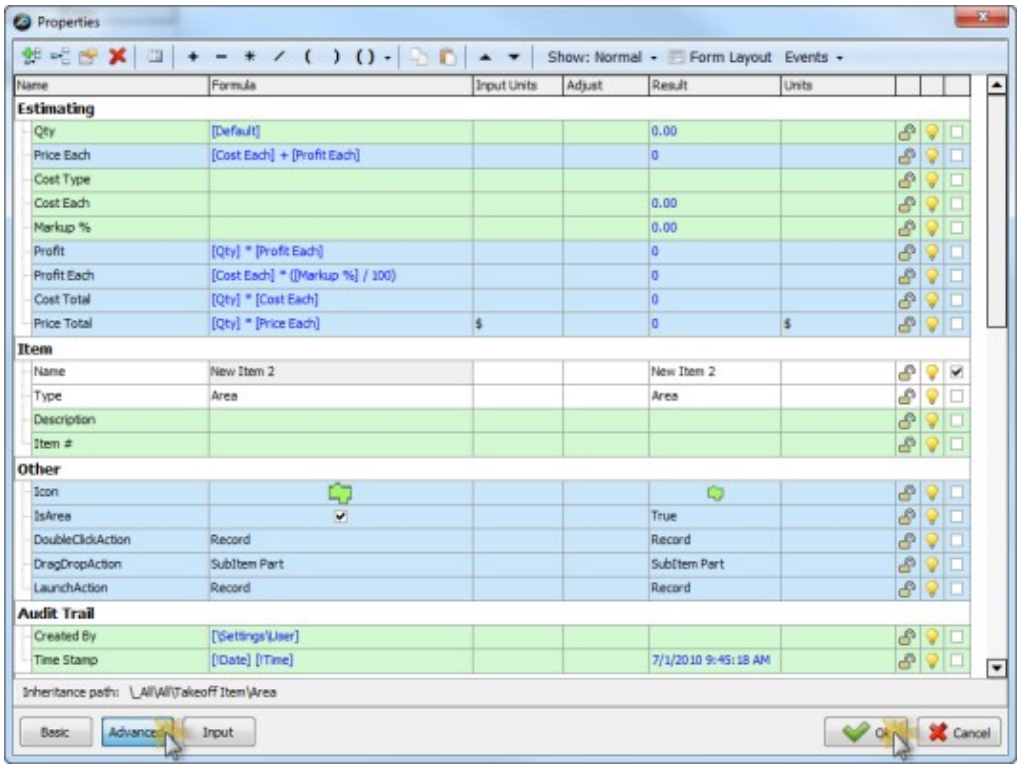
Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a New Area for your use.



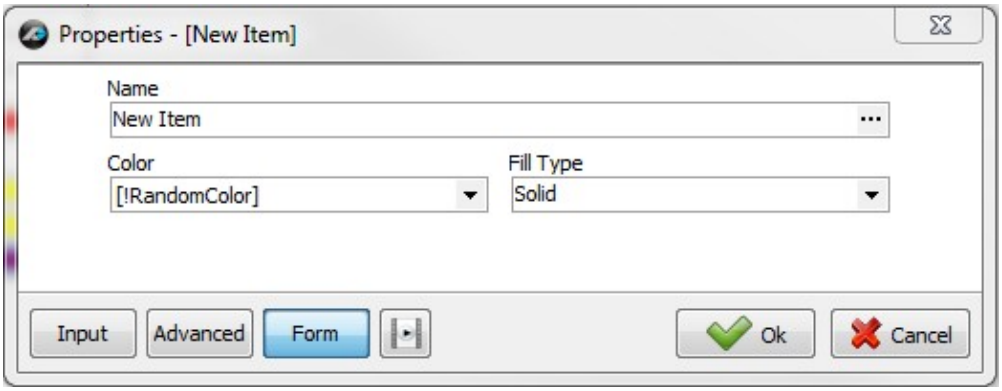
Template New Linear or Sub-Item Linear

From within the Templates tab you can create linear for use in estimating and takeoff before you need then, or export/import them into jobs.

1. To create a new linear select the 'New Linear' button, to create a new sub-item linear select the lower portion of the button.

2. The 'Form' properties window allows you to name your linear section, set the color, fill type and location.

3. When finished click the 'OK' button to continue, you have created a new linear section for your use.



4. The 'Advanced' Linear option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Estimating - This section allows you to estimate, set formulas and equation for estimating and define other linear estimating rules for use later.

Item - This section allows you to set general information about the template linear including the name and the linear type.

Other - Under this section you can set some of the action the linear will handle.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the folder.

Time Stamp - Date and Time the Folder was updated.

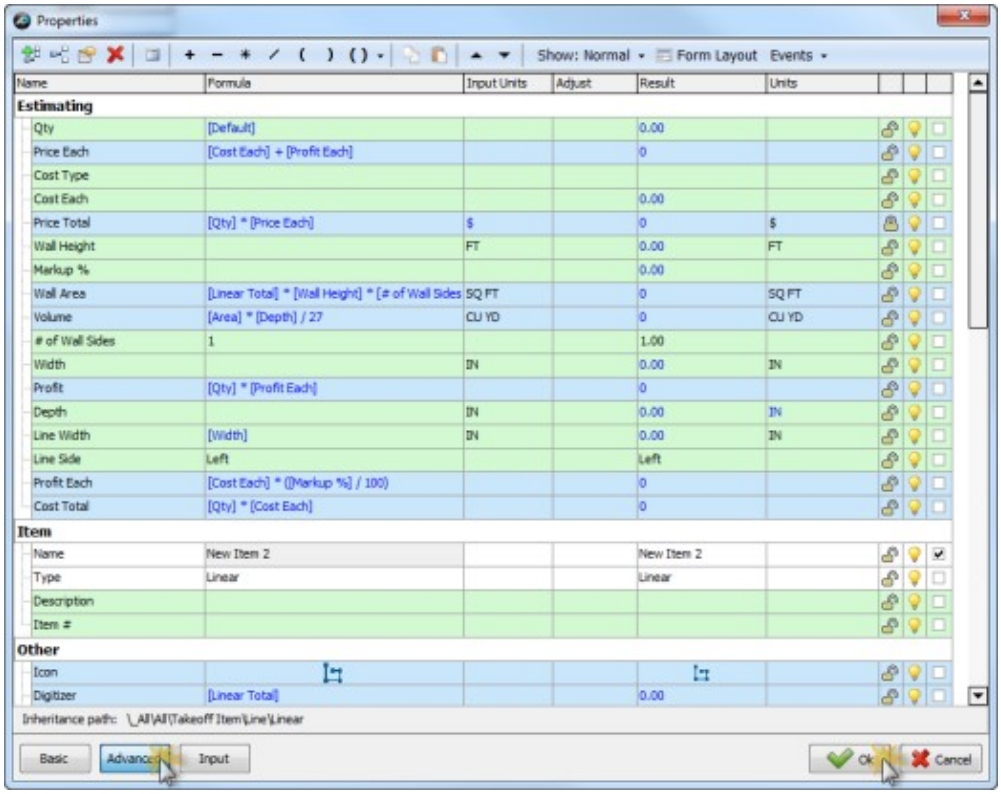
Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a New Linear for your use.



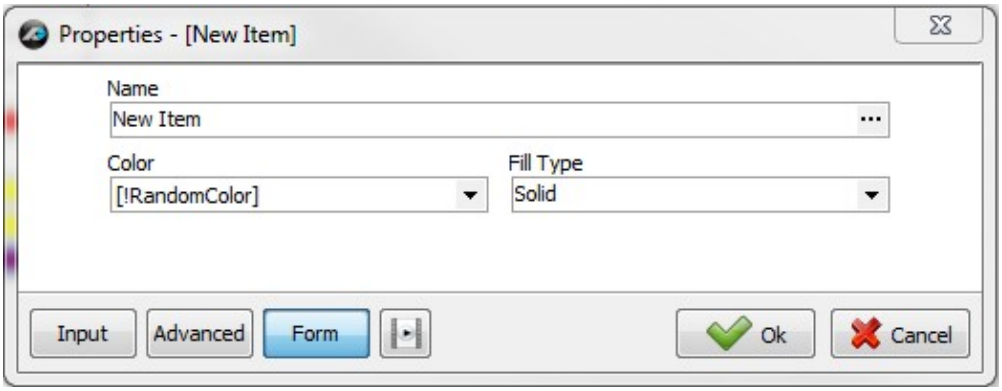
Template New Segment or Sub-Item Segment

From within the Templates tab you can create segment for use in estimating and takeoff before you need then, or export/import them into jobs.

1. To create a new segment select the 'New Segment' button, to create a new sub-item segment section select the lower portion of the button.

2. The 'Form' properties window allows you to name your segment section, set the color, fill type and location.

3. When finished click the 'OK' button to continue, you have created a new segment section for your use.



4. The 'Advanced' segment option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Estimating - This section allows you to estimate, set formulas and equation for estimating and define other segment estimating rules for use later.

Item - This section allows you to set general information about the template segment including the name and the segment type.

Other - Under this section you can set some of the action the segment will handle.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the folder.

Time Stamp - Date and Time the Folder was updated.

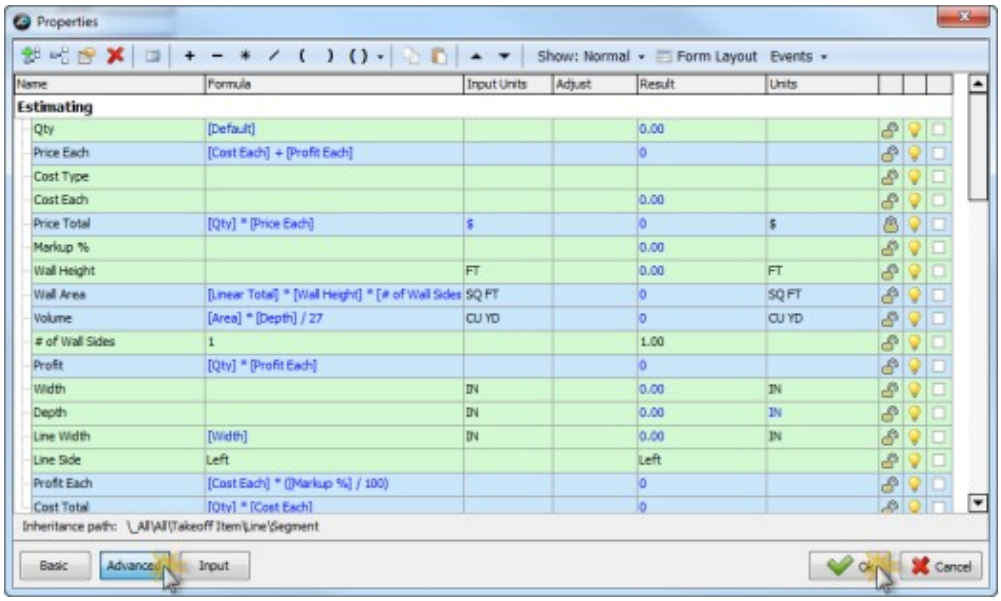
Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a New Segment for your use.



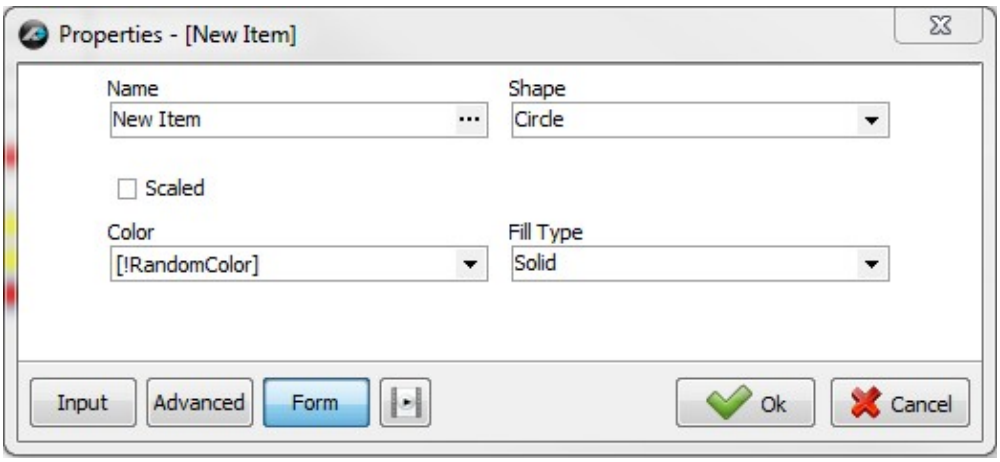
Template New Count or Sub-Item Count

From within the Templates tab you can create a new count for use in estimating and takeoff before you need then, or export/import them into jobs.

1. To create a new count item select the 'New Count' button, to create a new sub-item count select the lower portion of the button.

2. The 'Form' properties window allows you to name your count item, set the shape, size, color, fill and location.

3. When finished click the 'OK' button to continue, you have created a new count item for your use.



4. The 'Advanced' Count option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

Estimating - This section allows you to estimate, set formulas and equation for estimating and define other count estimating rules for use later.

Item - This section allows you to set general information about the template count including the name and the count type.

Other - Under this section you can set some of the action the count will handle.

Audit Trail - Properties related to when the folder was created and when it has been updated.

Created By - Who created the folder.

Time Stamp - Date and Time the Folder was updated.

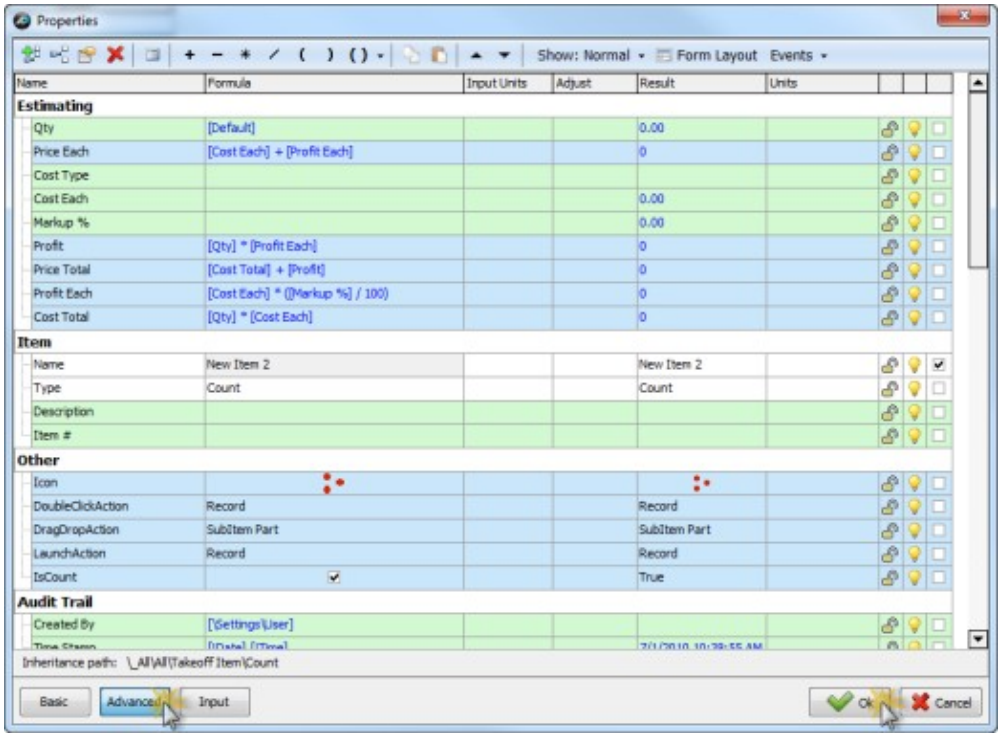
Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

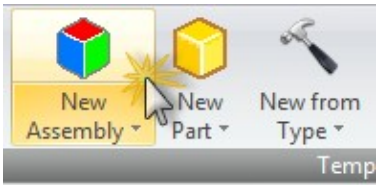
6. When done click the 'OK' button to continue, you have created a New Count for your use.



Template New Assembly or Sub-Item Assembly

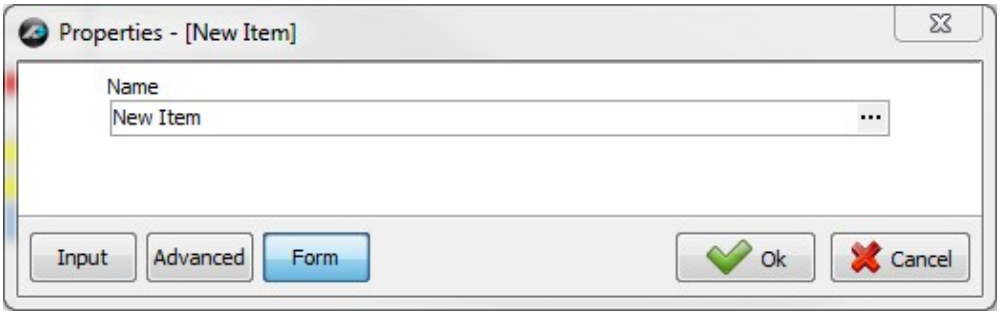
From within the Templates tab you can create assemblies for use in estimating and takeoff before you need then, or export/import them into jobs. Assemblies allow you to pre-build all the materials and tools you will need for a specific item, such as concrete slabs.

1. To create a new assembly select the 'New Assembly' button, to create a new sub-item assemble select the lower portion of the button.



2. The 'Form' properties window allows you to name your assemble and set basic information about the assembly.

3. When finished click the 'OK' button to continue, you have created a new assemble for your use.



4. The 'Advanced' Assembly option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

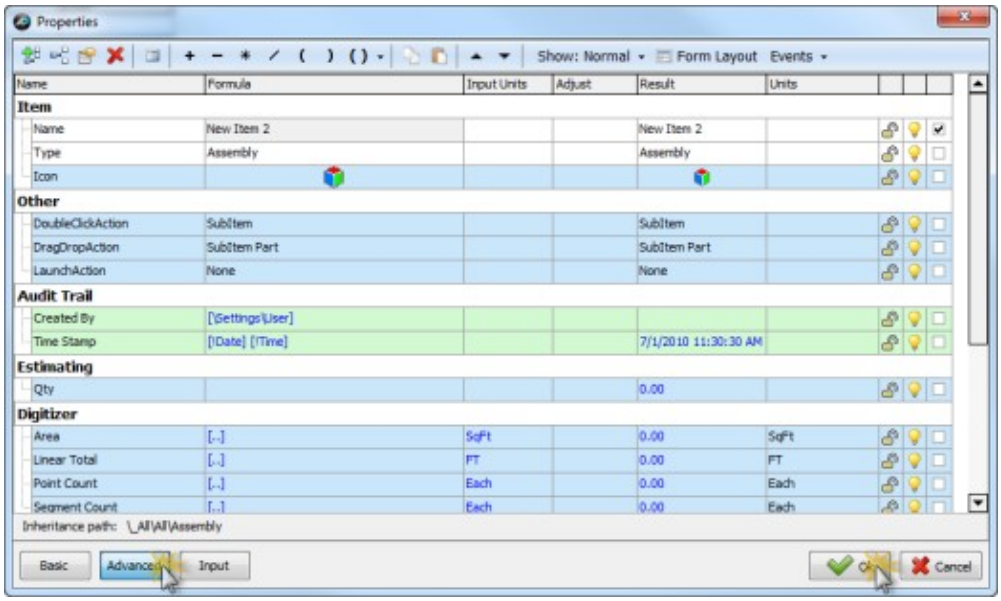
Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a New Assembly for your use.



7. Once the assembly has been created you can add your other materials, labor, equipment etc as sub items of the assembly. This can be done in several ways depending on how you have created your items.

- You can right click on one of your other parts in your templates and select copy, then select the newly created assembly and right click and select 'Paste as Sub Item'
- You can select the newly created assembly and add a 'New Item as a Sub Item'. See Creating parts for more information about this.
- To watch a video about advanced properties, click here.

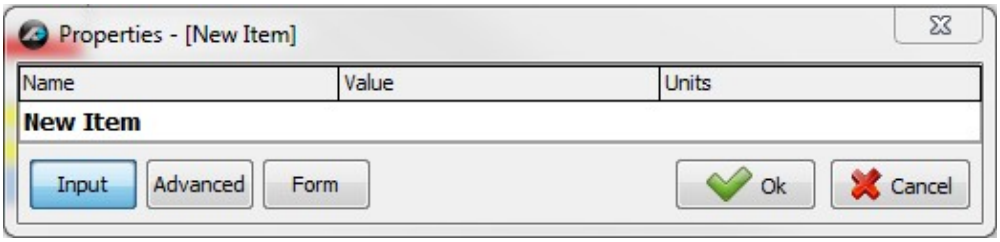
Template New Part or Sub-Item Part

From within the Templates tab you can create new part for use in estimating and takeoff before you need then, or export/import them into jobs.

1. To create a new part select the 'New Part' button, to create a new sub-item part select the lower portion of the button.

2. The 'Form' properties window allows you to name your part, set the cost and markup.

3. When finished click the 'OK' button to continue, you have created a new part for your use.



4. The 'Advanced' Parts option allows you to enter, set and update more option.

5. Select the 'Advanced' button to open the properties window.

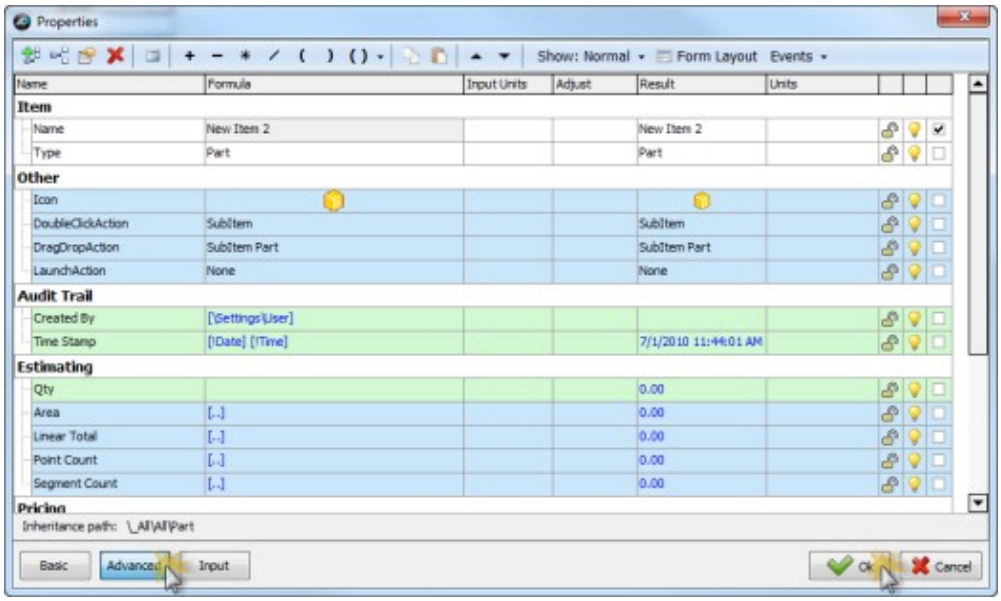
Padlock - Allows you to lock and unlock the contents of that row. Clicking on the lock will change the setting.

Light bulb - Indicated if the row is visible or not.

Yellow Bulb - Row Visible.

Gray Bulb - Row will be invisible.

6. When done click the 'OK' button to continue, you have created a New Part for your use.



To watch the video on this topic, click here.

Copy and Paste Buttons

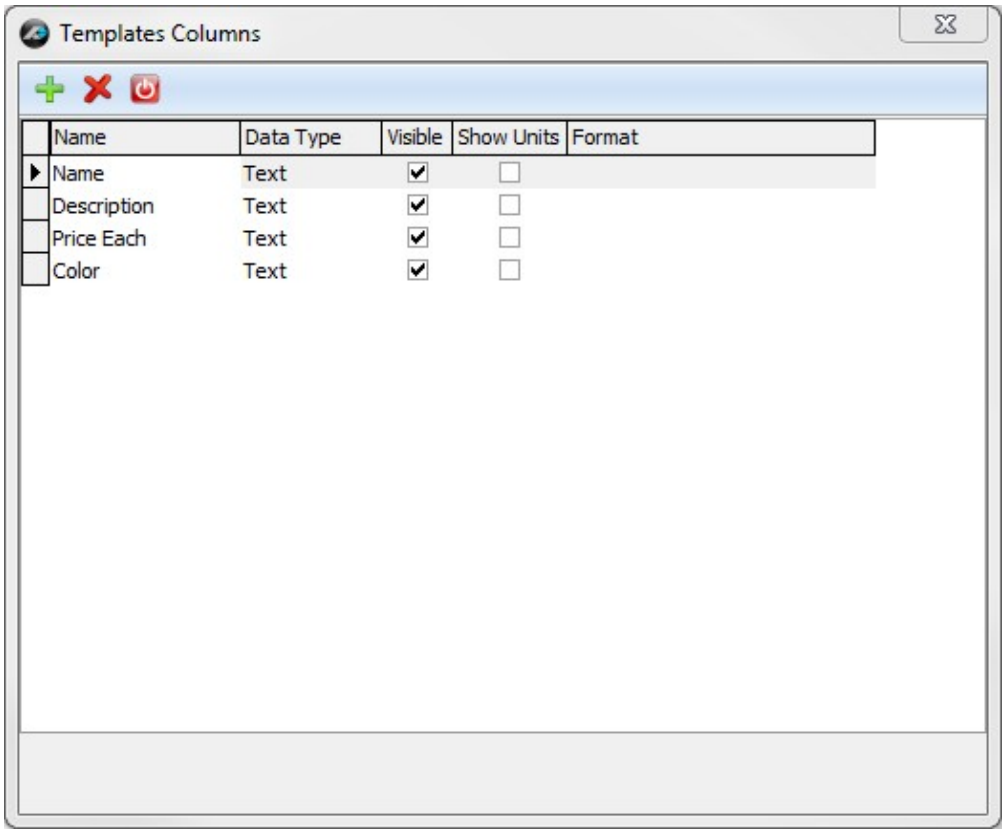
'Copy' - Copies the selected information to your clipboard.

'Paste' - Copies estimate information from your clipboard.

Templates Columns Button

The 'Columns' button allows you to update, add and delete columns on your estimating form.

1. Select the 'Columns' button to open the Estimate Columns dialog box.



You can make changes or update directly on the form. Select the item you would like to update and change the information.

To add a column select the plus (1) then enter your information about the column.

To delete a column select the column then select the x (2). The column will be removed from the estimating table.

To close the dialog box select the close button (3). Your changes will be saved and will take effect.

Name - Use this column to give your estimate column a descriptive name.

Date Type - Select the type of data that will be found in this column.

Text - Allows Alphanumeric characters such as letter, numbers, and characters.

Number - Allow number to be input into the cell.

Check box - Creates the cell as a check box allowing a Yes/No selection.

Visible - Do you want the Column to be visible or not visible.

Show Units - Will display units of measure.

Format - Allows you to set how the column contents are formatted and the number of decimal points displayed.

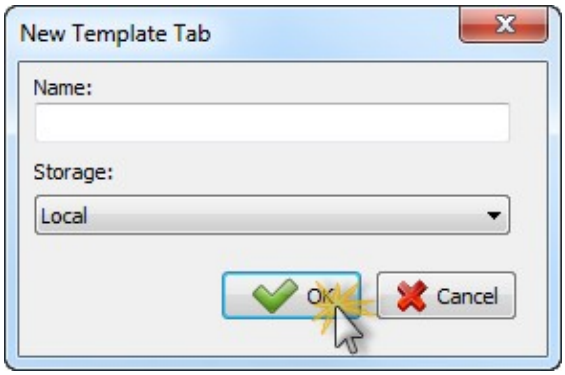
Create New Template Tab

The 'New Tab' button allows you to add tabs to the template desktop. These tabs allow you to organize your assemblies, tool, parts and other items into useful group. You can also export and import tab between jobs.

1. Select the 'New Tab' button to open a new tab.

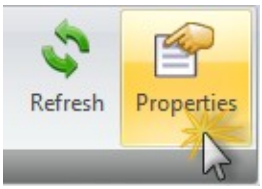
2. Enter a name and update the storage location is you want.

3. When you are done click the 'Ok' button, your new tab will be available at the top of your desktop.

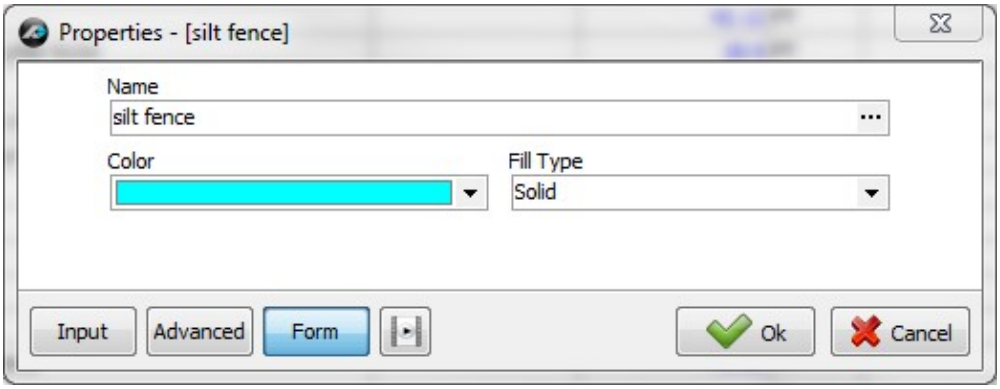


Estimate and Templates Column Properties

The 'Properties' button allows you to change, add, or delete estimate column properties, including adding formulas and advance items.



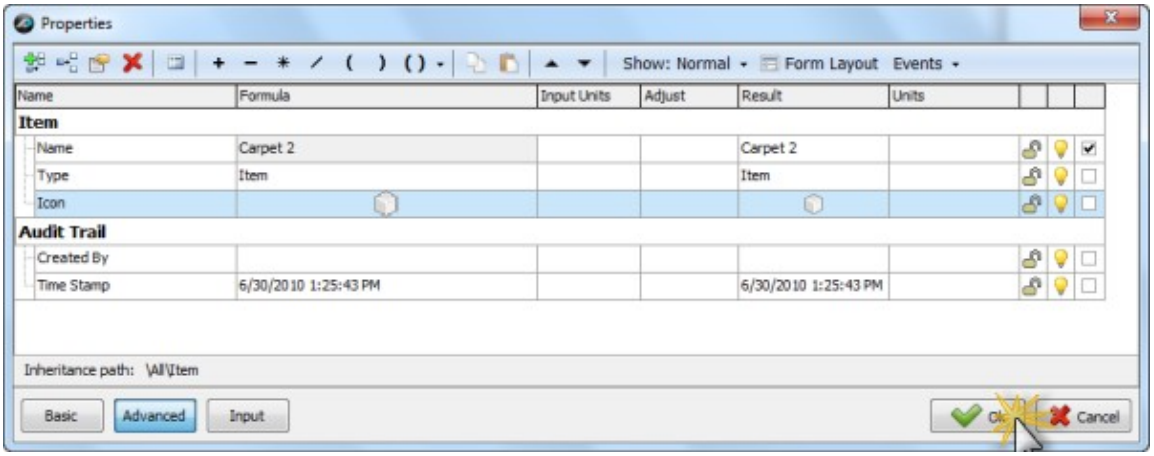
The Form window allows you to change the name of the column.



To make greater changes select the Advanced button.

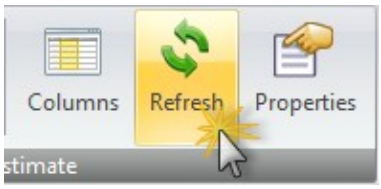
In the advanced window you can make any change you would want. You can update information, add formulas, and see when the column was changed.

When done click the 'Ok' button to close the window.



Estimate and Templates Refresh Button

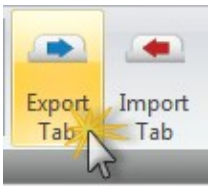
Use the 'Refresh' button to refresh the screen and estimating numbers with any updates you may have made.



Export Tab

The Export tab allow you to export tab you have already made from a job to be used later in other jobs.

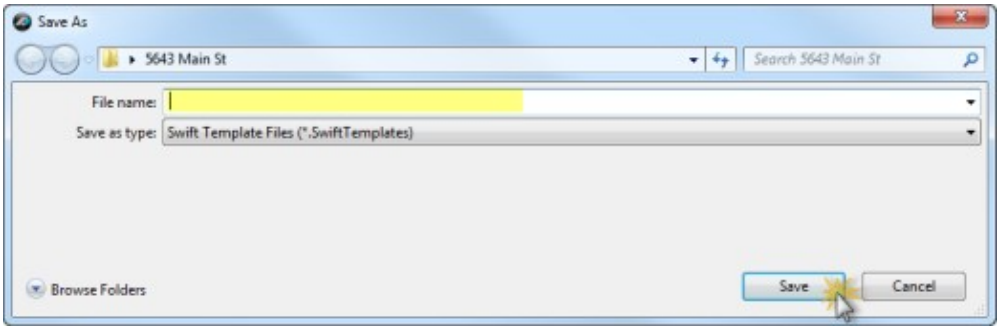
1. Select the 'Export Tab' to start.



2. Select or navigate to the location you want to export the tab into.

3. Name the tab.

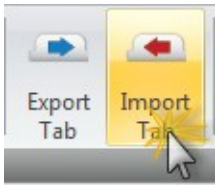
4. Click the 'Save' button to finish export the tab. The window wil close automatically when done.



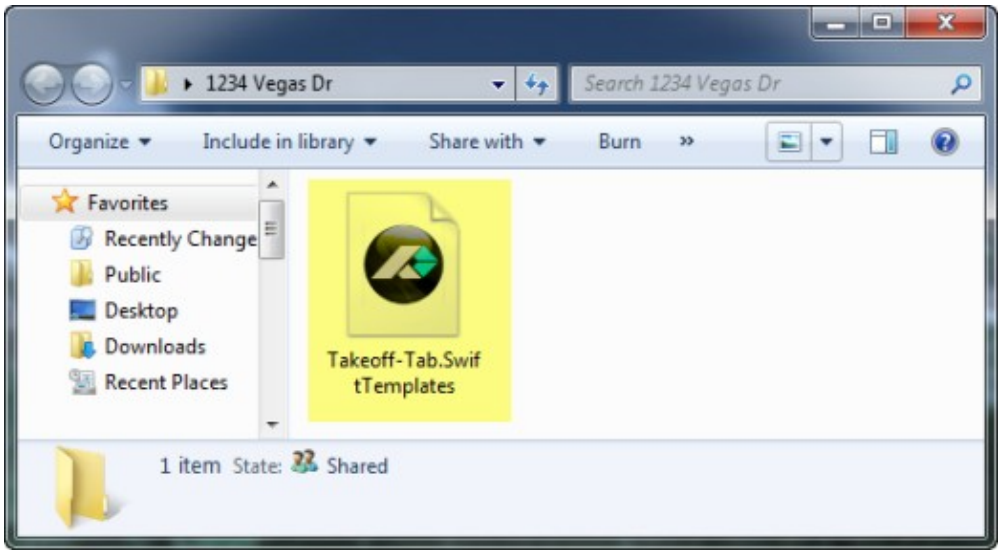
Import Tabs

You can import tabs you have previously exported into any job.

1. Select the 'Import Tab' button.

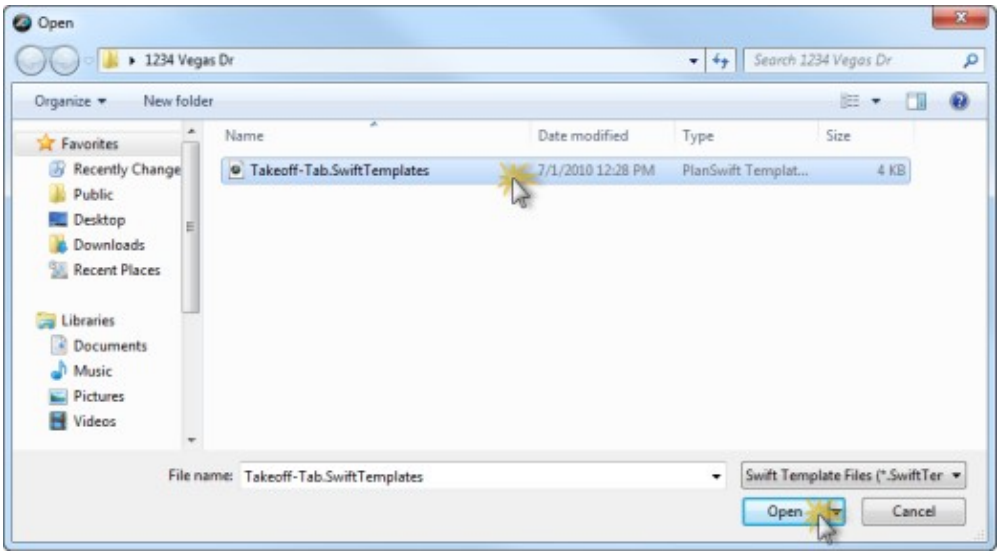


Here is an example of what a PlanSwift tab file would look like.



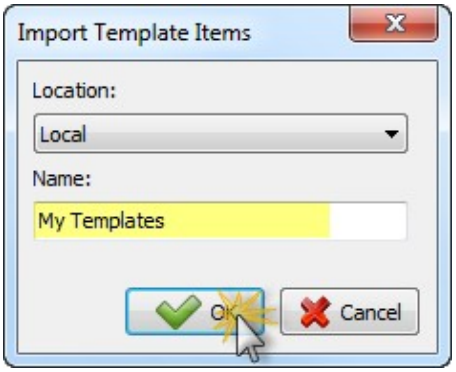
2. Select the tab file you want to import. You can either enter the information or navigate to the file.

3. Click the 'Open' button to continue.



4. Select the location to store the tab and enter the name for the tab.

5. Click 'Ok' and the tab will be loaded and available to you.



Estimate and Template Adjust Buttons

The 'Adjust' buttons allow you to quickly change the level and sub-level of columns in your estimates.

'Up Arrow' - Moves the selected column up one level.

'Down Arrow' - Moves the selected column down one level.

'Left Arrow' - Moves the selected column up one sub-level.

'Right Arrow' - Moves the selected column down one sub-level.

Settings

Data Storage Locations Deleting and Properties

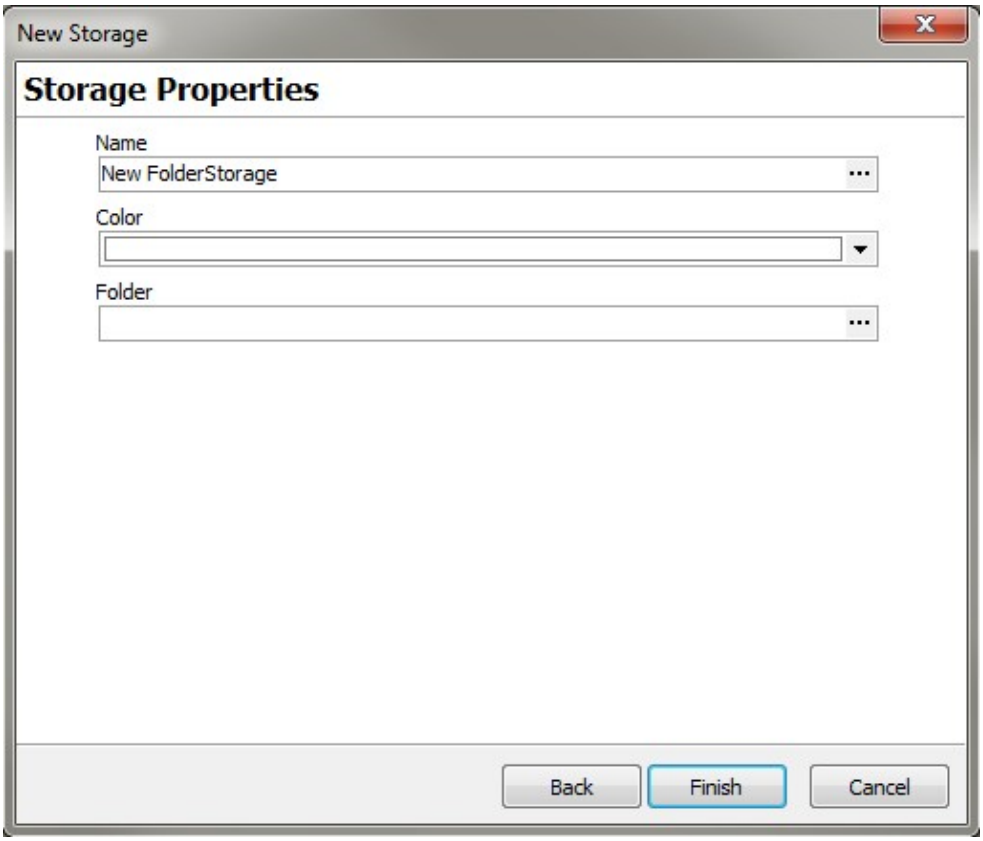
You can easily change your data storage properties or delete a location from within the setting tab.

1. Select 'Data Storage' from the list.

2. To Delete a location select the location then the 'Remove' button.

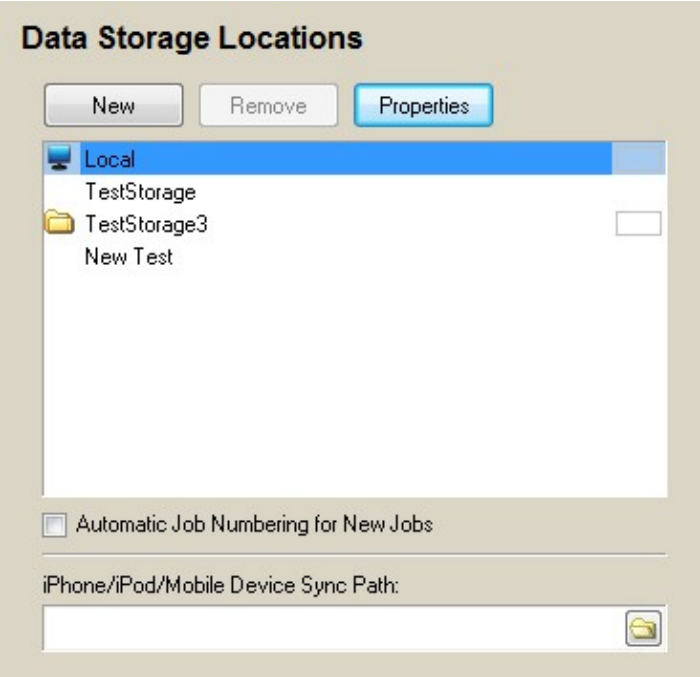
And to add a new location, click on the 'New' button, which will open the 'New Storage' window where you can enter a name for the location and choose a destination for that new location.

You can also select a color for the storage.



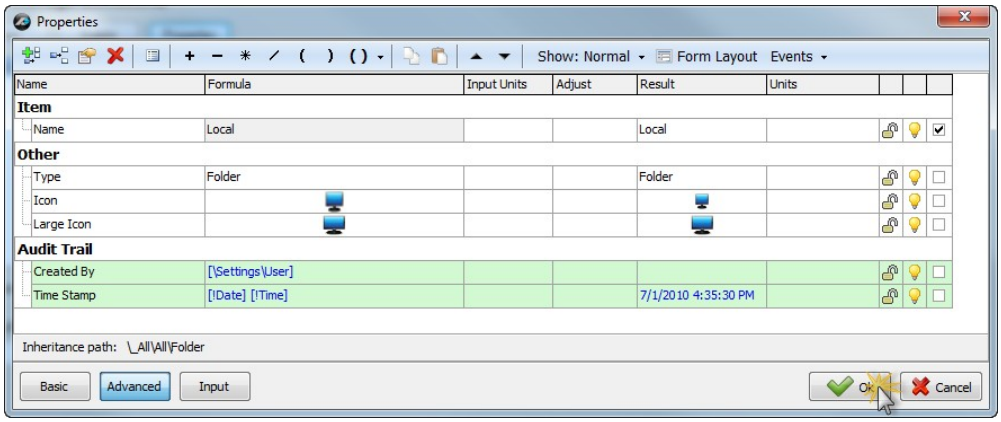
3. Confirm your choice then the location will be added or deleted.

4. To see the data location properties select the 'Properties' button.



5. You can make some changes from the Advanced Properties Box.

6. When complete click the 'OK' button to close the box. Any changes you have made will take effect at this time.



General Settings

The General Settings page allows you to make several choices about your overall settings in PlanSwift.

Select 'General' from the list.

1. When checked will automatically open the last job you had open the next time you open PlanSwift.

2. When checked will automatically open to the first page of a job when you open that job in PlanSwift.

3. When checked will automatically open to the last view you have open the next time you open that job.

4. When checked will automatically remove the PlanSwift license when you exit the program.

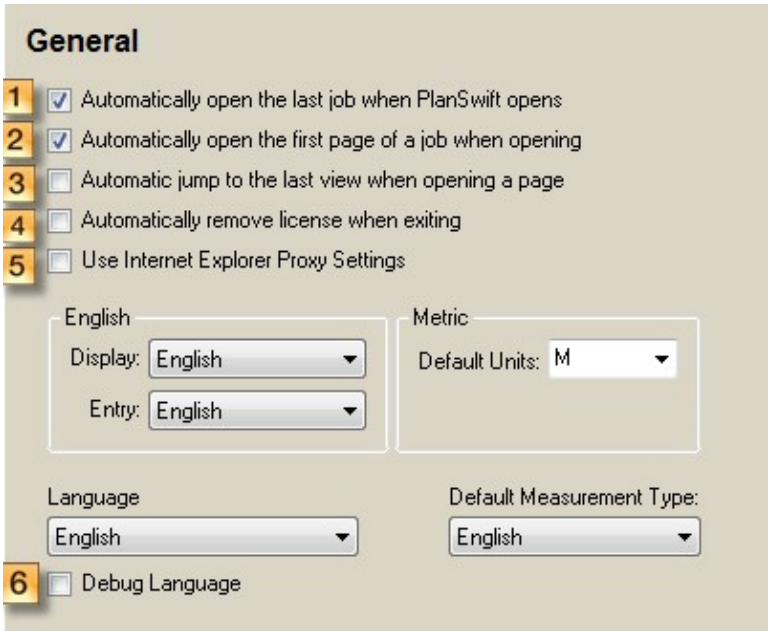
5. When checked will use the proxy settings from Internet Explorer for the network address of the intermediary server that is used between the browser and the Internet.

6. Only applies to Beta version

English - Select Display and Entry units is either English or FIS.

Metric - Select the default unit of metric measurement mm/cm/m/km.

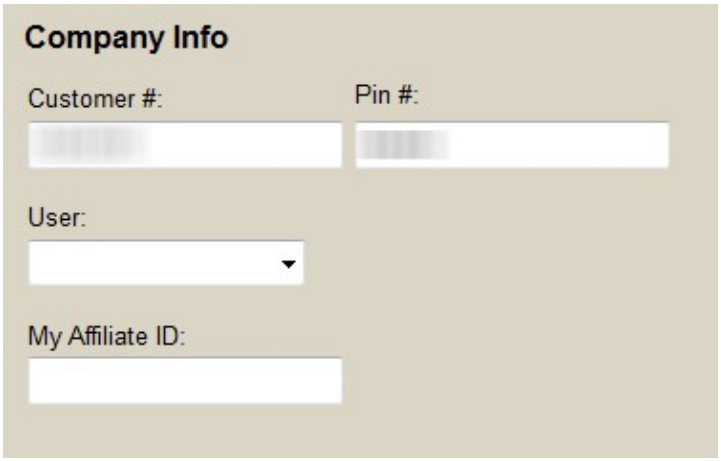
Language - Select the language PlanSwift should display.


General
1
Automatically open the last job when PlanSwift opens
2
Automatically open the first page of a job when opening
3
Automatic jump to the last view when opening a page
4
Automatically remove license when exiting
5
Use Internet Explorer Proxy Settings
English
Display:
English
Entry:
English
Metric
Default Units:
M
Language
English
Default Measurement Type:
English
6
Debug Language

Company Information Settings

From the Company Info tab you can enter information specific to you and your company.

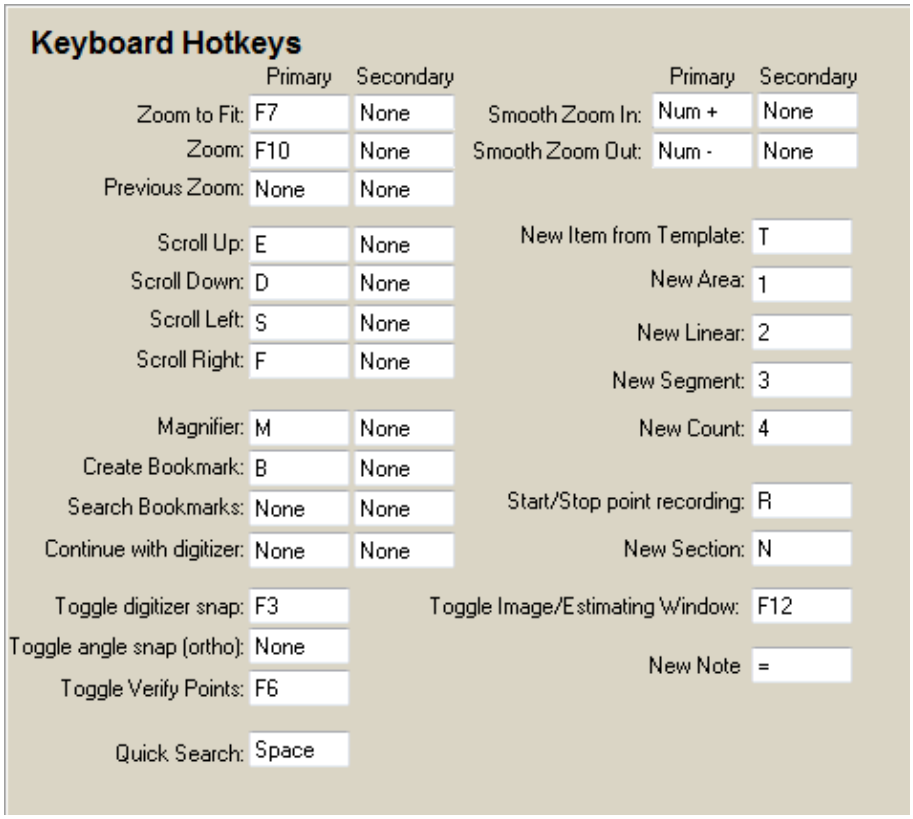
From the 'Company' list selection you can update your customer number, pin number, user name, and affiliate ID.



Keyboard Hotkeys

Keyboard Hotkeys allow you to make quick one key selections of tasks you do often.

PlanSwift comes with many already set hotkeys however you may update and change then as you like. For some options you may select two different hotkeys.



Interface

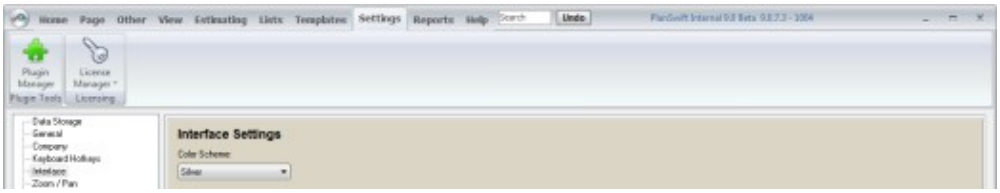
The Interface list selection allows you to select several option about the look and feel of PlanSwift.

Color Scheme allows you to pick the colors you prefer, Black, Blue or Silver.

Black

Blue

Silver



1. When checked shows the Under the Hood Screen Tab. This allows access to some of the internal settings of PlanSwift, although you may need to make changes here it is advisable to work with professionals when "Under The Hood".

2. When checked will show the Types tab in Templates.

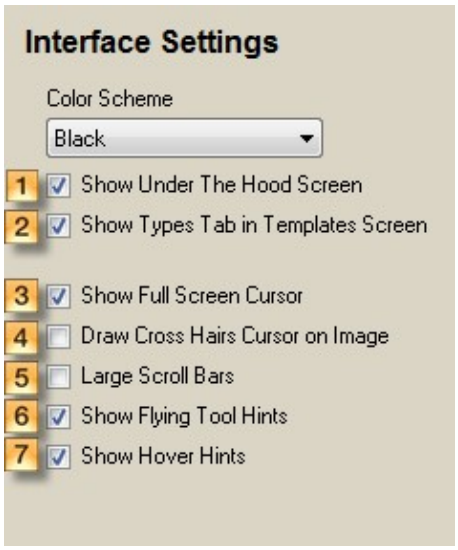
3. When checked will show a full screen cursor rather than a smaller one.

4. When checked will cause the cross hairs to be displayed on your plan images.

5. When checked will show large scroll bars rather than smaller ones.

6. When checked will show you tool hints.

7. When checked will show you digitized information.

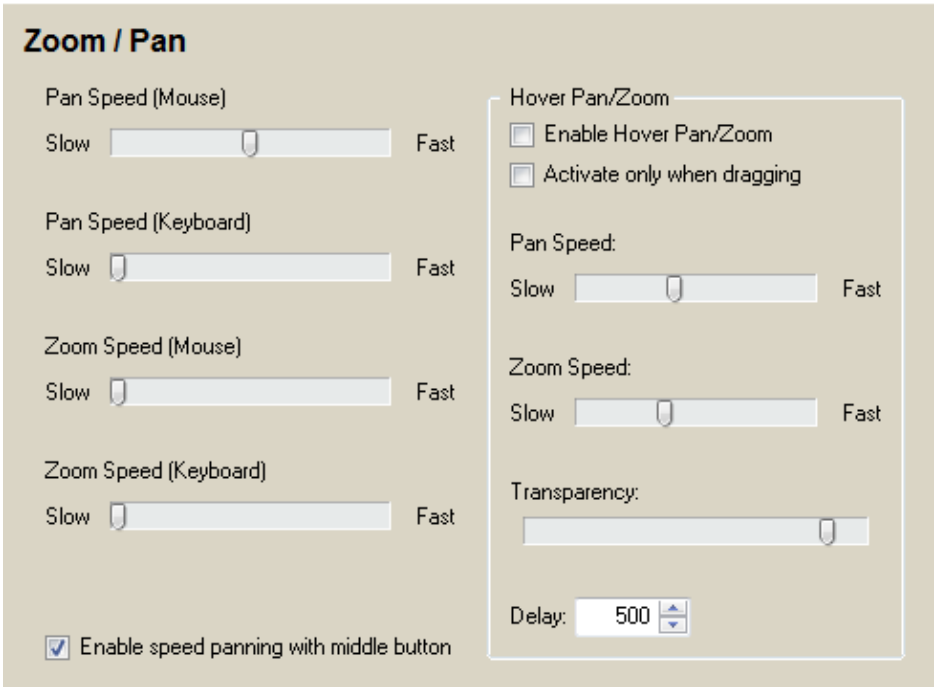


Zoom and Pan Options

The Zoom/Pan selection allows you to set option about the Speed and look of Zoom/Pan features..

Pan Speed - Mouse and Keyboard sets the speed panning occurs at.

Zoom Speed - Mouse and Keyboard sets the speed zooming occurs at.



Annotations Settings

The Annotation Settings allow you to set the default options for your annotations.

These defaults can be overridden when selecting them for use in pages.

'Default Label Settings' - Allows you to set the default look and feel of labels including font, text height, color and transparency.

'Default Note Settings' - Allows you to set the default look and feel of notes including font, text height, color and transparency.

'Default Dimension Settings' - Allows you to set the default look and feel of dimensions including font, text height and color.

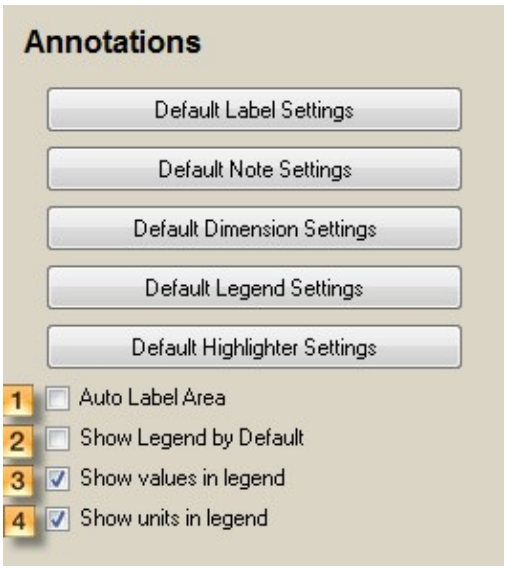
'Default Legend Settings' - Allows you to set the default look and feel of legend including font, color and transparency.

1. When checked will automatically label area for you as you create them.

2. When checked will show plan legend by default, however this can be changed if you prefer.

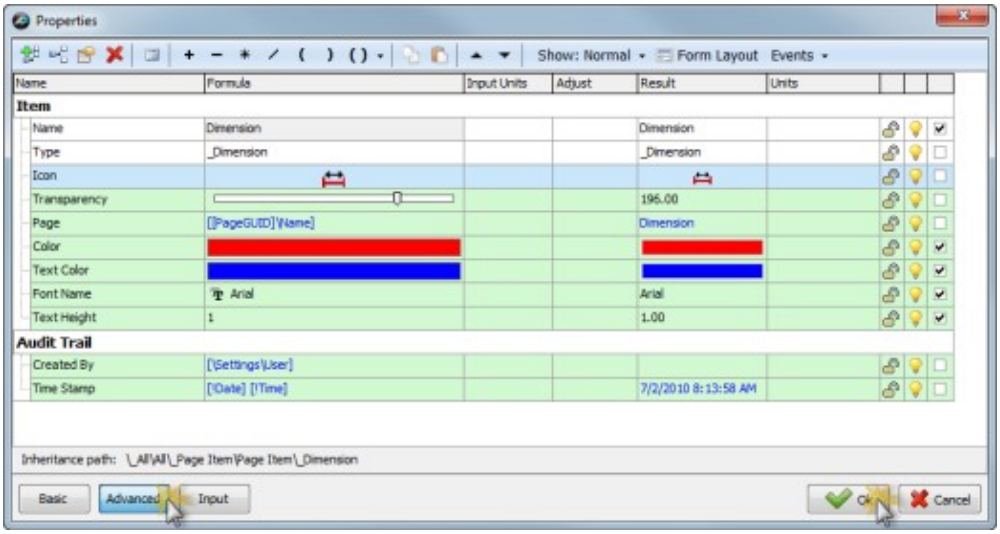
3. When checked will display values in the legend.

4. When checked will display units in the legend.



The Advanced Properties window allow you to set the details about the Annotations.

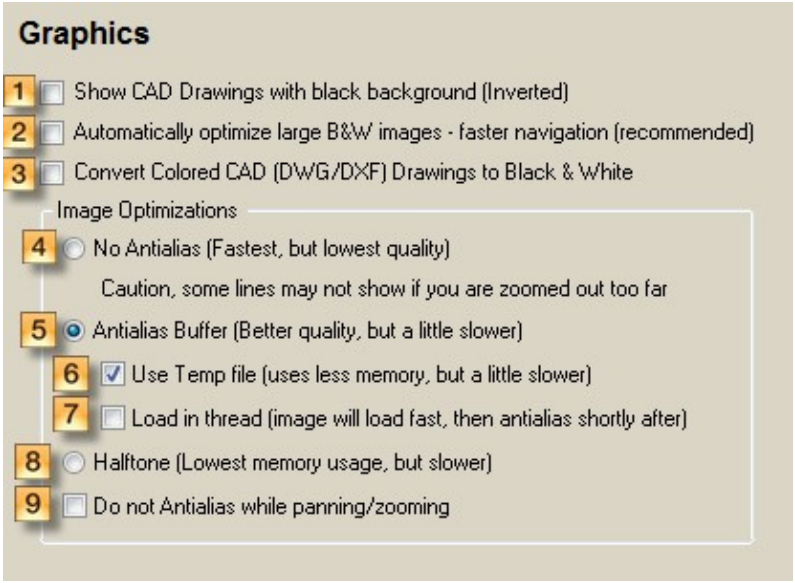
When complete click the 'OK' button to save and close the window.



Graphic Settings

The Graphic settings section allow you to set some default graphic options for all plans.

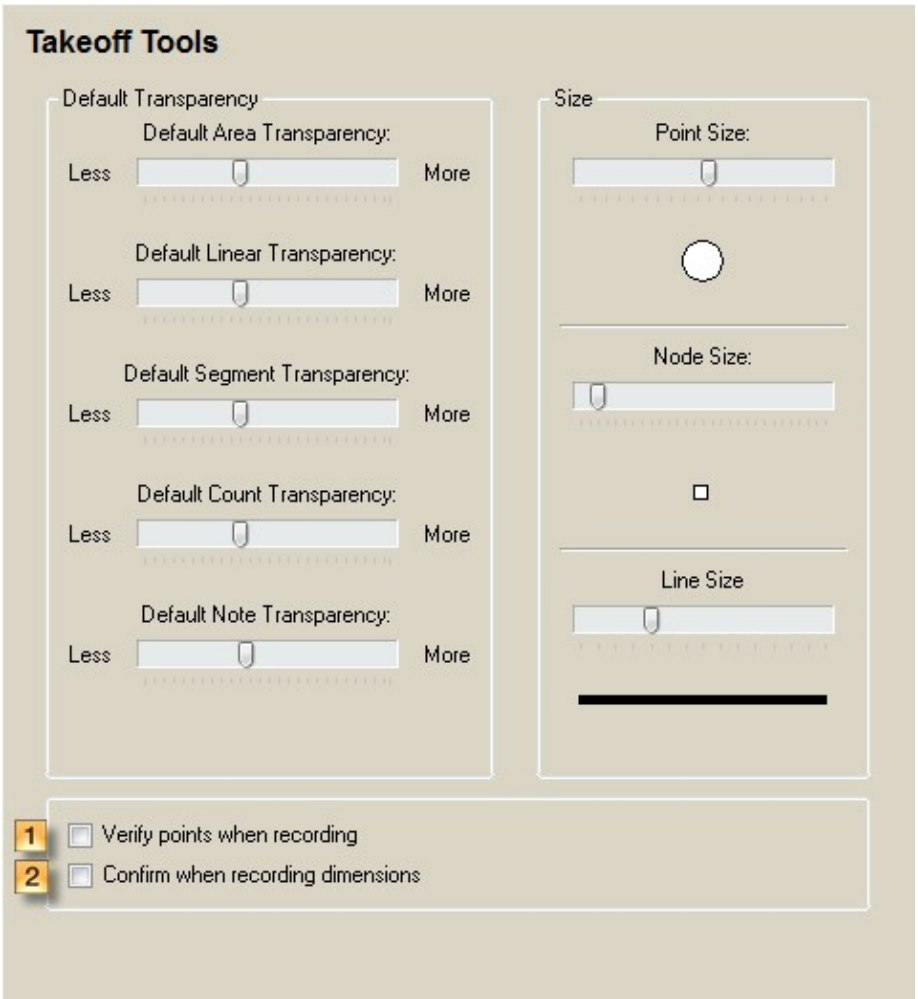
1. When checked optimizes large black and white images allowing for faster navigation.
2. When checked will show CAD drawing with a black background.
3. When checked will automatically convert colored CAD drawings into black and white plans.
4. When checked will enhance anti-aliasing of your image to allow for a better quality image.


Graphics
1 Show CAD Drawings with black background (Inverted)
2 Automatically optimize large B&W images - faster navigation (recommended)
3 Convert Colored CAD (DWG/DXF) Drawings to Black & White
Image Optimizations
4 No Antialias (Fastest, but lowest quality)
Caution, some lines may not show if you are zoomed out too far
5 Antialias Buffer (Better quality, but a little slower)
6 Use Temp file (uses less memory, but a little slower)
7 Load in thread (image will load fast, then antialias shortly after)
8 Halftone (Lowest memory usage, but slower)
9 Do not Antialias while panning/zooming

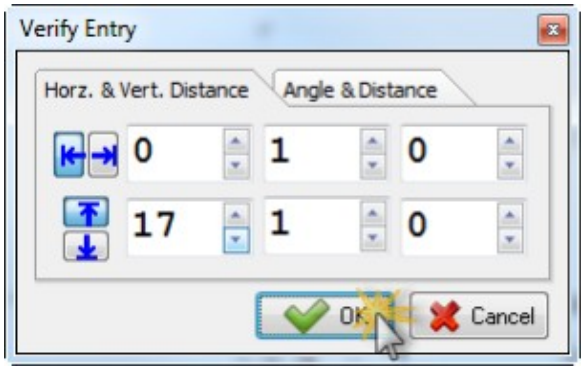
Takeoff Tools Settings

The Takeoff Tools setting allows you to set defaults for when you do takeoffs.

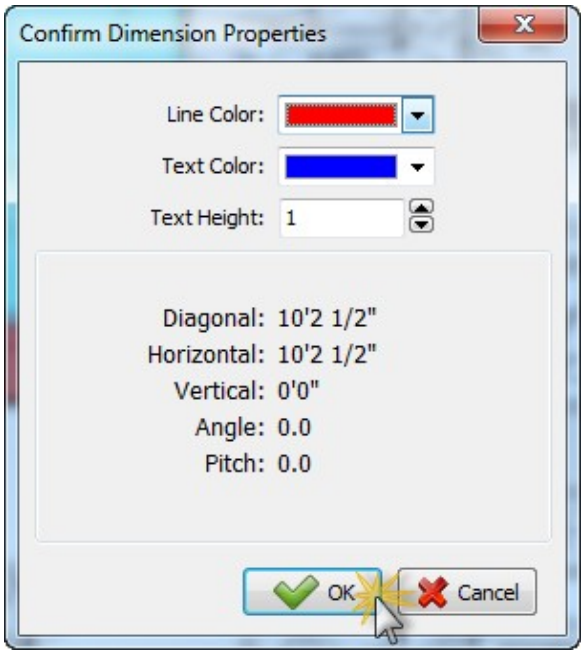
1. When checked will require you to verify your points before recording with the Verify Entry Box.
2. When checked will require you to verify the dimension properties before continuing.



Sample verify points confirmation box. You much clicking 'OK' to verify and continue.

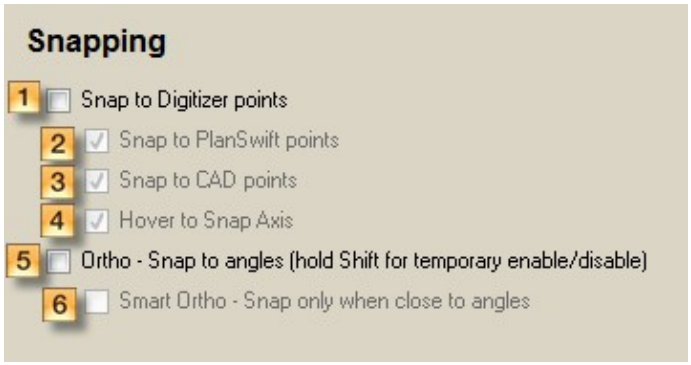


Sample dimension confirmation box. You much click 'OK' to verify the dimensions and continue.



Snapping Settings

The Snapping settings allow you to set how and when the snapping feature works on PlanSwift.

1. 

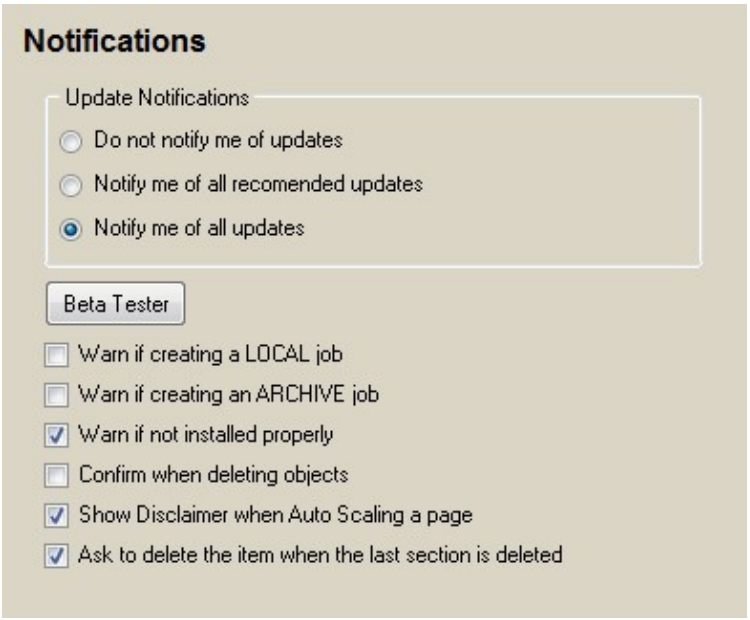
   Check this option to enable all selected snap options.
2. This will snap only to points created by the PlanSwift digitizers.
3. This will enable PlanSwift to snap to points created in CAD files.
4. This option enables you to snap to a point but if you hover at that point for a second or two the red snap box will turn green thus locking on that axis.
5. Ortho will lock the digitizer on the 90 and 45 degree axis.
6. this option allows a bit more refinement only snapping to the 90 and 45 degree axis when you are within a few degrees of them.

Notification Settings

The Notification settings allows you to set how you will be alerted of PlanSwift updates.

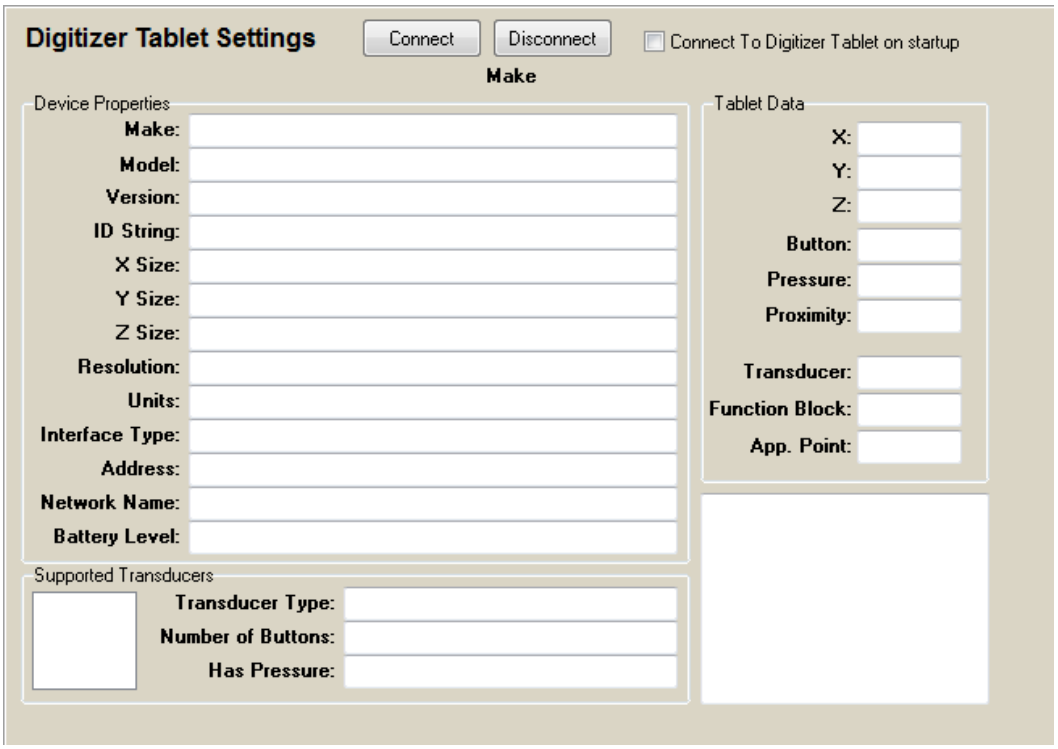
You can select not to be notified, to always be notified or notified only when recommended updates are available.

You can also check for updated at anytime under the HELP tab and Automatic Updates.


Notifications
Update Notifications
Do not notify me of updates
Notify me of all recomended updates
Notify me of all updates
Beta Tester
Warn if creating a LOCAL job
Warn if creating an ARCHIVE job
Warn if not installed properly
Confirm when deleting objects
Show Disclaimer when Auto Scaling a page
Ask to delete the item when the last section is deleted

Digitizer Tablet Settings

This selection allows you to set your digitizer tablet connection options so PlanSwift can easily connect directly to your digitizer.



New Data Storage

Creating a new data storage location with PlanSwift is easy. You may create as many storages as you like. These can be Network locations or additional local locations on your pc. You can also use portable hard drives. Special considerations will need to be taken if you plan on using portable a hard drive on multiple computers. You will need to ensure that the drive letter designation that windows sets is the same on all systems. Documentation on changing drive letters can be found from Microsoft Here.

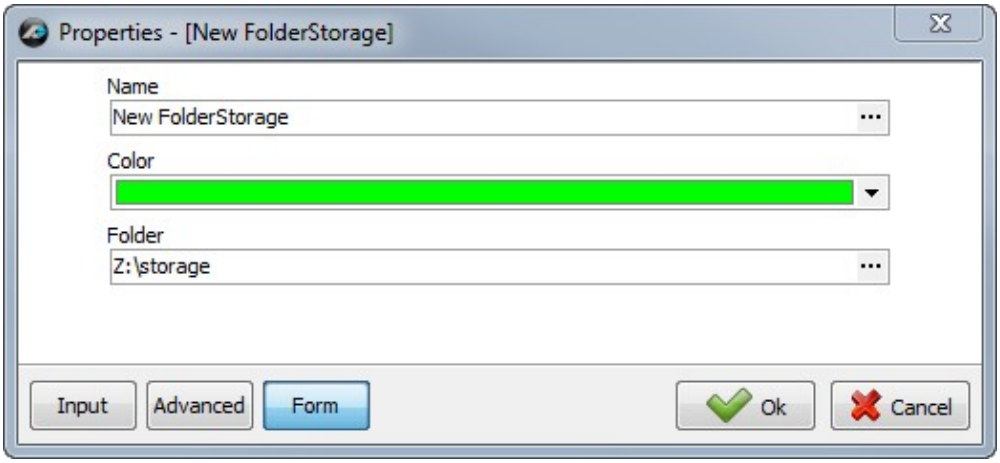
---

1. Select the 'Data Storage' option.

2. Click 'New' to select a new storage location

Note: From this location you can also set the path to your iPhone/iPod.

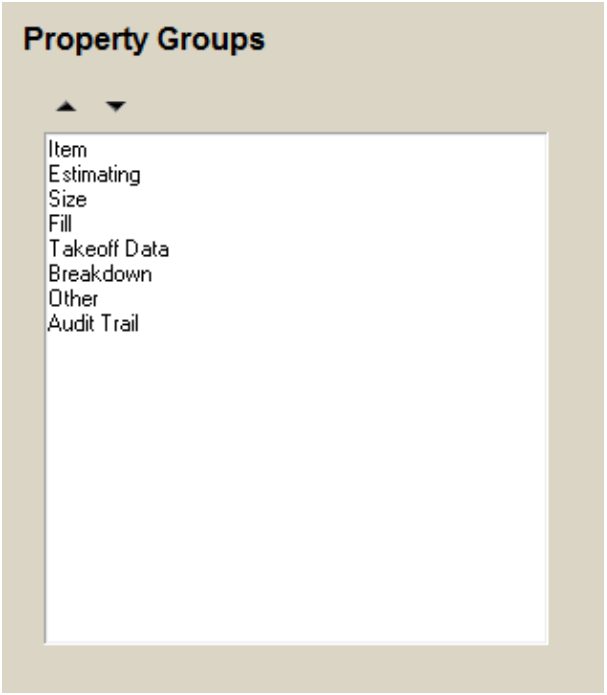
3. Enter the storage folder name and either enter the folder location or navigate to the folder location by clicking on the ellipsis button. Click 'Finish' when you are done.



Important Note: This directory must remain in a clean state. Do Not add additional files or folders to this directory through Windows Explorer.
PlanSwift Storages should only be modified by the PlanSwift Application

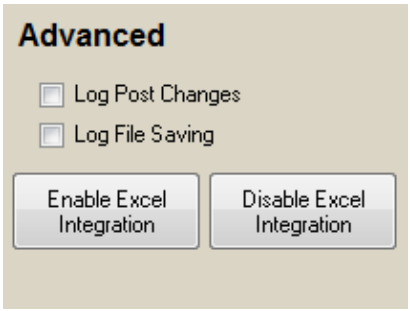
Property Groups

This allows you to edit the order that Property Groups appear in an advanced property window view.



Advanced

These options are utilized by Technical Support for trouble shooting purposes.



Reports

Report Layout

The report layout allows you to select the look and content of reports. You can select from predefined reports or create your own.

1. Allows you to create a New Folder.

2. Allows you to save the current report layout for later recall.

3. Allows you to add a new report layout.

4. Allows you to delete the current report layout.

5. Allows you to refresh the Report List.

6. Allows you to edit the properties of the selected Report.

Basic - The simplest of the report layouts show basic icon, name, and digitizer information.

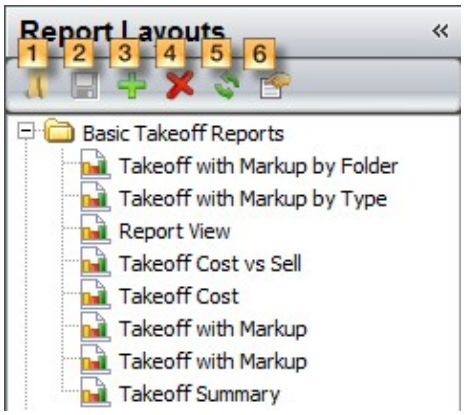
Estimate with Markup - Show your estimate numbers along with any markups you may have.

Estimate - Customer Copy - Show the same information as the Estimate with Markup but without the markup information for viewing by customers.

Request for Quote - Provides the necessary information for other contractors to give you quote on work.

By Location - Breaks the report down by location if you are working with multiple location on one report, such as multiple houses or office units.

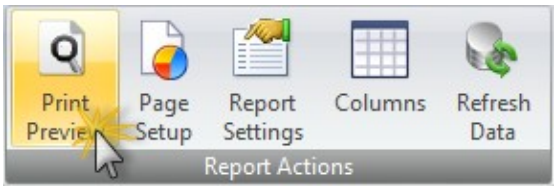
Report View - Provides you will all the information available for the reports.



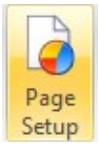
You can customize these reports or create new report layouts anytime you want.

Print Preview

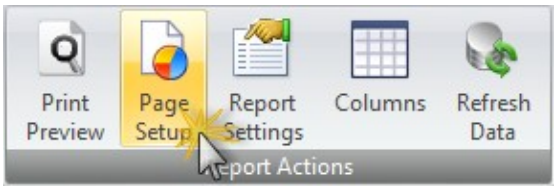
The 'Print Preview' button will allow you to see what your report will look like when printed. See also Page Setup to modify how the page will print.

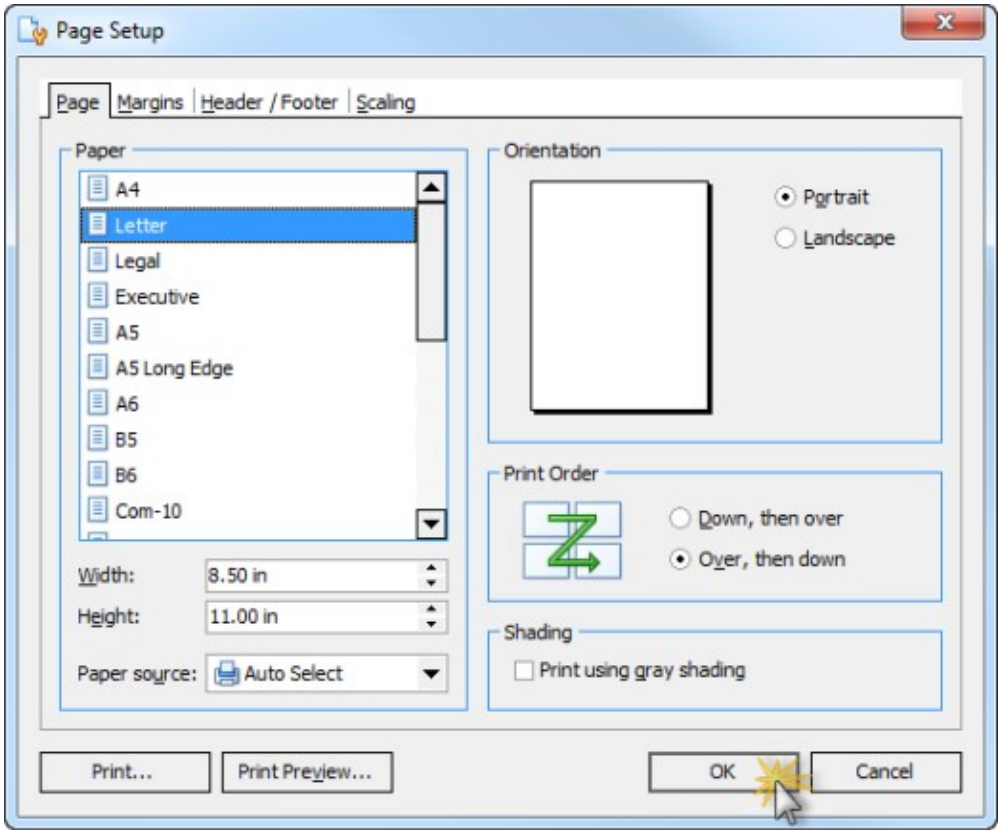


Page Setup



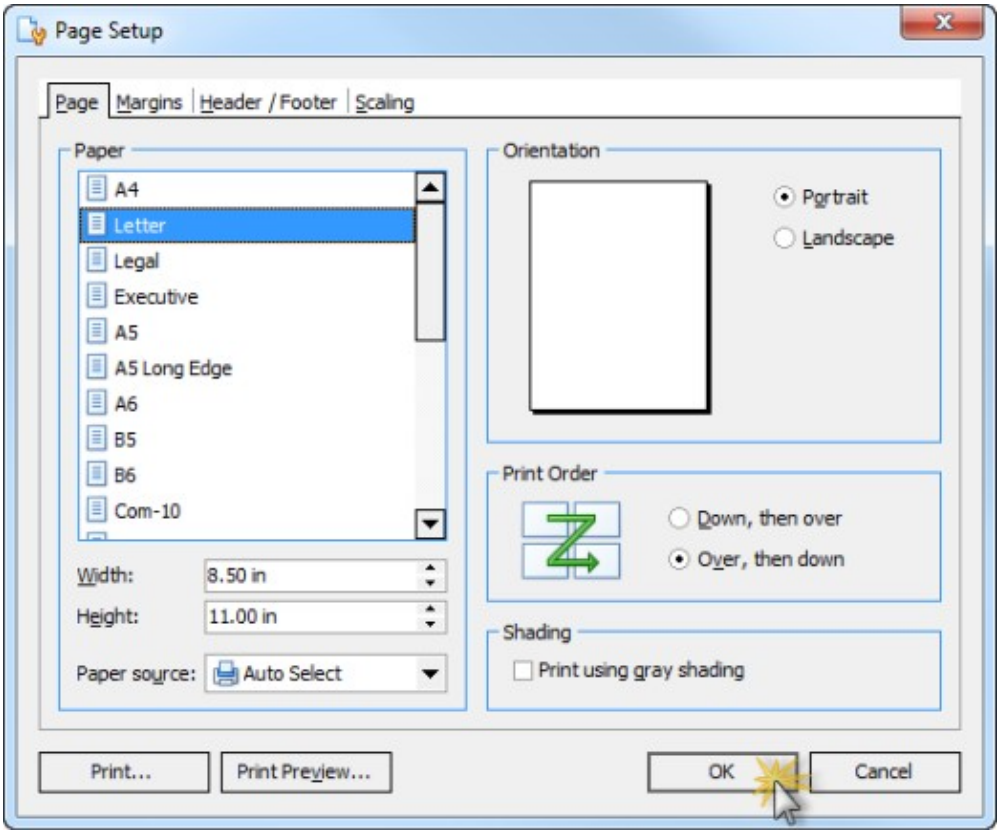
The 'Page Setup' button allows you to set details about the report page layout, such as paper size, orientation, margins and scaling. Specific settings may vary based on your printer manufacture options.



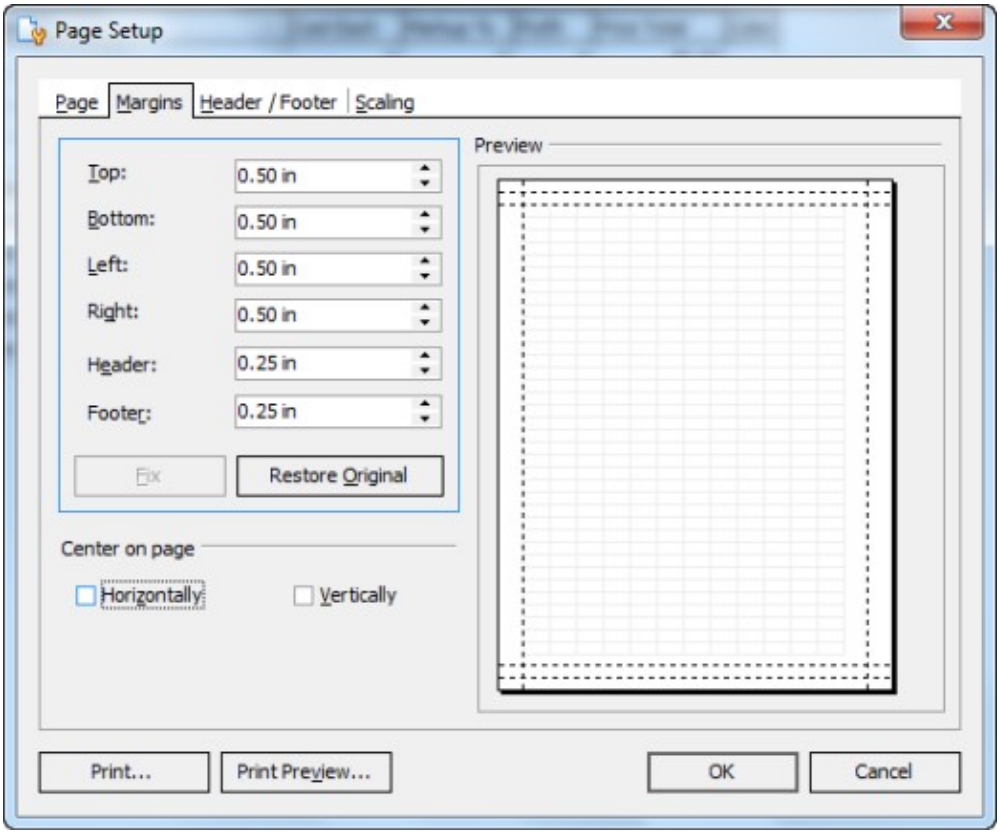


When all is set as you like you can click the 'Print' button to print or the 'OK' button to close the window.

Page Tab - Allows you to set the paper size, source and order pages print in when the plan is bigger than one sheet of paper.



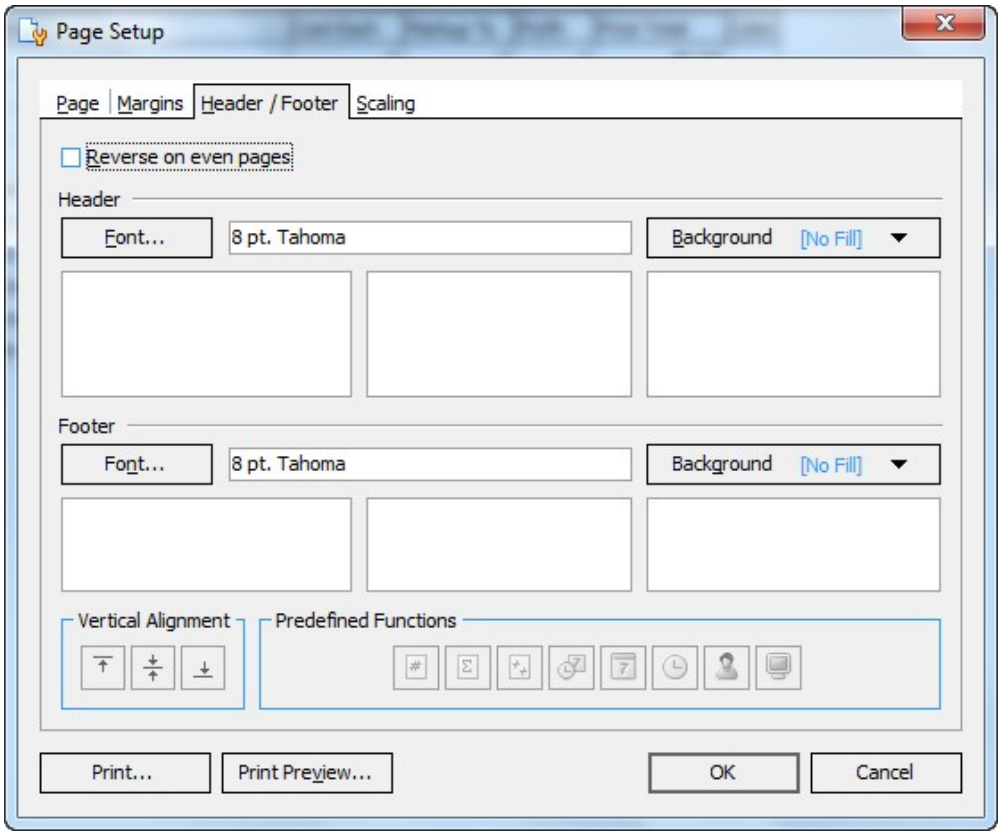
Margins Tab - Allows you to set the margins around the paper and to select if you want the material centered on the page.



Header/Footer Tab - Allows you to add headers and footers to all pages of you printed document.

You can select the font type, color and size, and background color, along with what you want the header or footer to say.

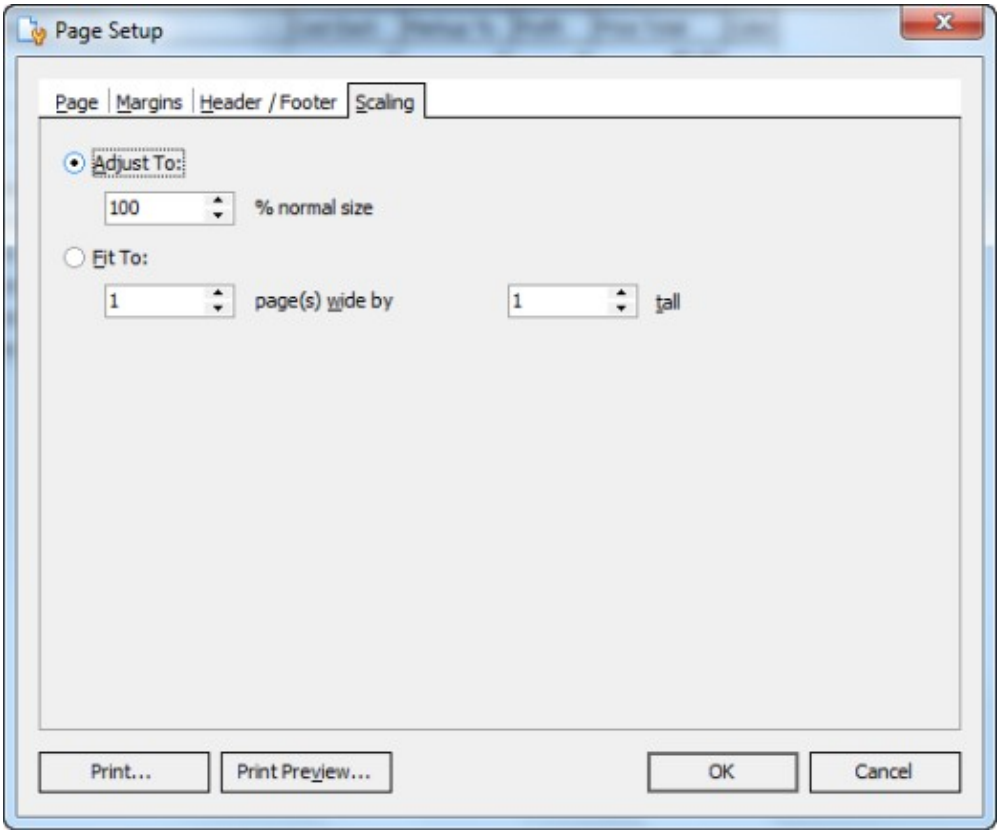
PlanSwift has several useful predefined functions you can add to any part of you footer or header by first selecting the placement of the item then clicking on the function.



Scaling Tab - Allows you to set the scaling size of the report.

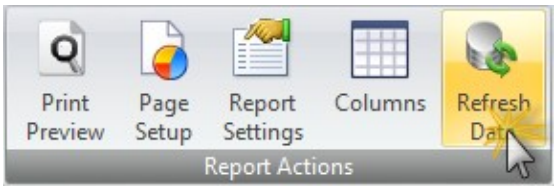
Adjust To - Scales the document to a percentage of original size from 1% and up.

Fit To - Scales the pages to fit multiple pages on a single sheet of paper.


Page Setup
Page
Margins
Header / Footer
Scaling
Adjust To:
100
% normal size
Fit To:
1
page(s) wide by
1
tall
Print...
Print Preview...
OK
Cancel

Refresh Data

The 'Refresh Data' button reloads the data in the reports updating any changes you may have made outside of the reports section.



Export to Excel

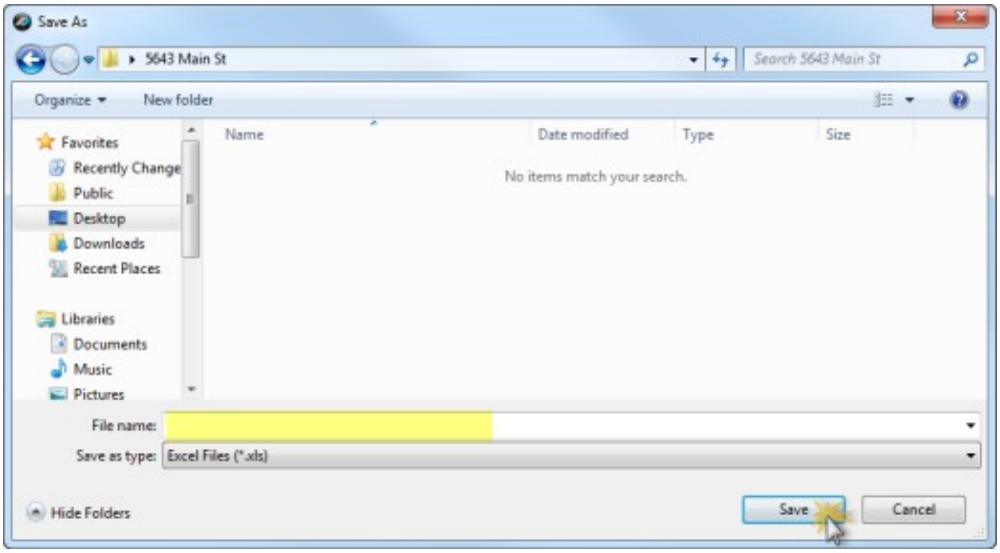
PlanSwift has made it easy to export reports to Excel spreadsheets.

1. Select the 'Export to Excel' button.

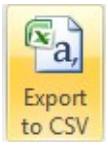
2. Enter or browse to the location you want to save the Excel file.

3. Enter the file name.

4. Click 'Save' to save the file. The window will close automatically when complete.



Export to CVS



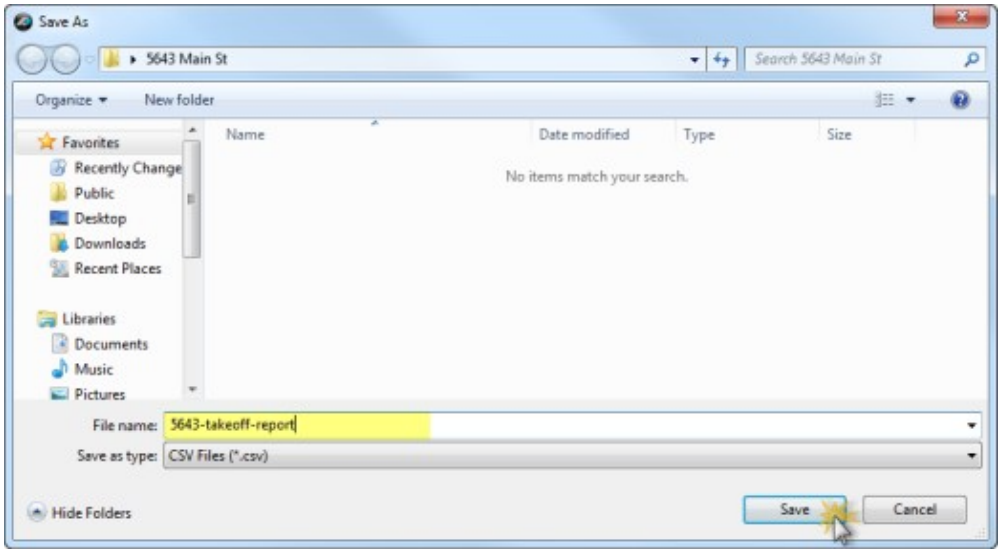
PlanSwift has made it easy to export reports to CSV spreadsheets.

1. Select the 'Export to CSV' button.

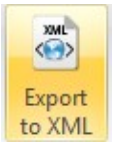
2. Enter or browse to the location you want to save the CSV file.

3. Enter the file name.

4. Click 'Save' to save the file. The window will close automatically when complete.



Export to XML



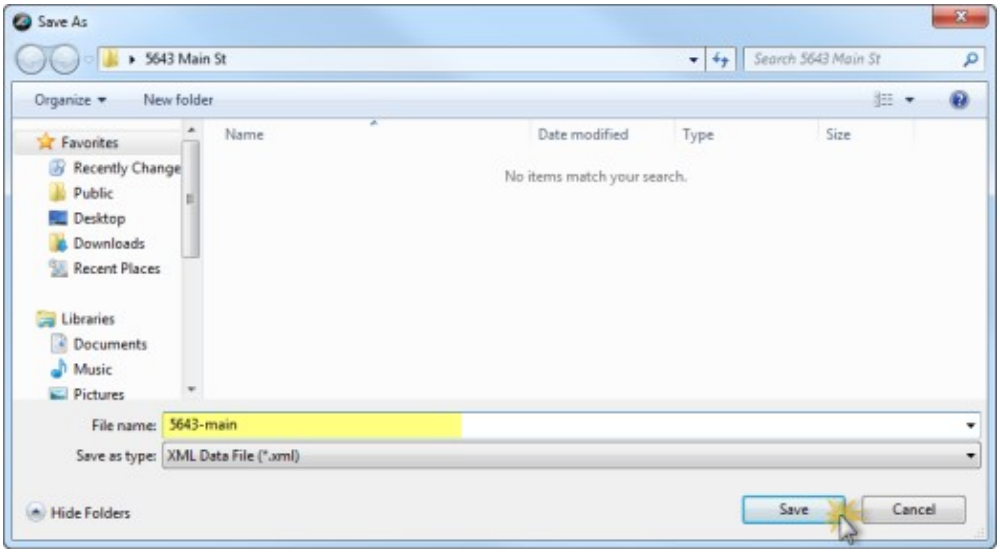
PlanSwift has made it easy to export reports to XML format.

1. Select the 'Export to XML' button.

2. Enter or browse to the location you want to save the XML file.

3. Enter the file name.

4. Click 'Save' to save the file. The window will close automatically when complete.

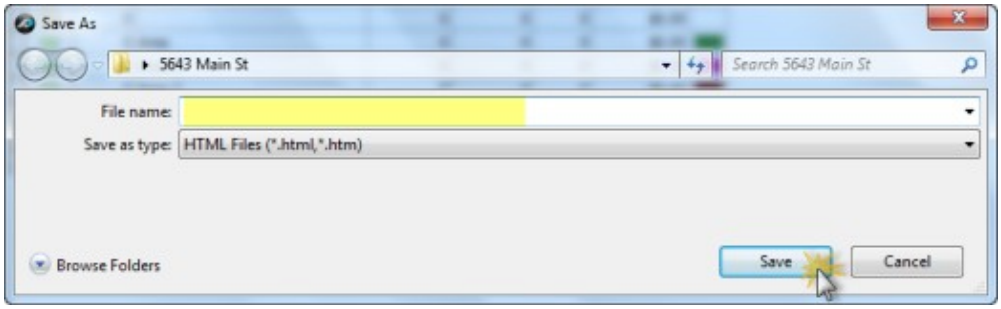


Export to HTML

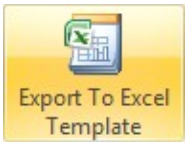
PlanSwift has made it easy to export reports to HTML format.

1. Select the 'Export to HTML' button.

2. Enter or browse to the location you want to save the HTML file.
3. Enter the file name.
4. Click 'Save' to save the file. The window will close automatically when complete.



Export to Excel Template



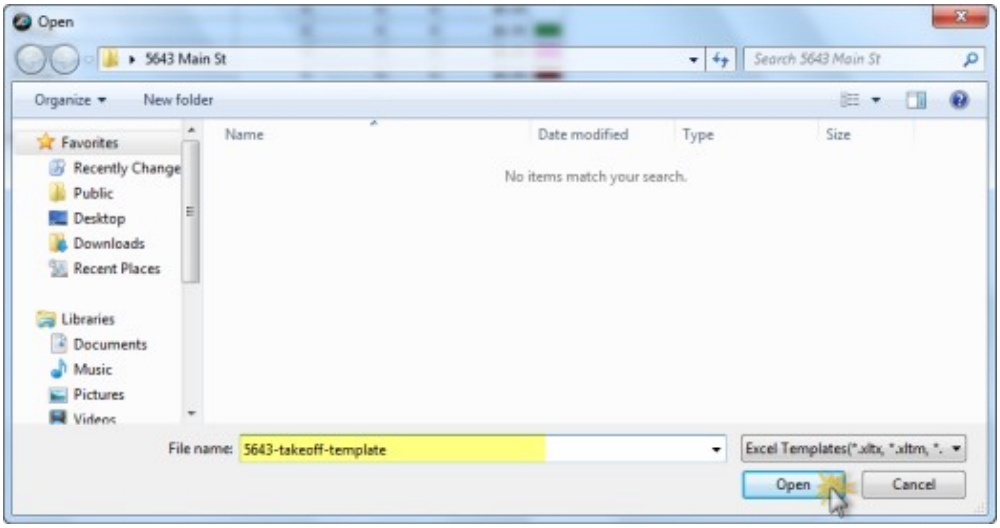
PlanSwift has made it easy to export reports to an Excel Template format.

1. Select the 'Export to Excel Template' button.

2. Enter or browse to the location you want to save the Excel Template file. The template file must contain the proper syntax for the exported data to display.

3. Enter the file name.

4. Click 'Save' to save the file. The window will close automatically when complete.



Print Reports

Printing report with PlanSwift is quick and easy.

1. Select the 'Print' button to start.

2. Select the print you want to print to from the drop down menu. You default printer should be already listed.

3. Select the Pages you want printed.

All - Will print all the pages.

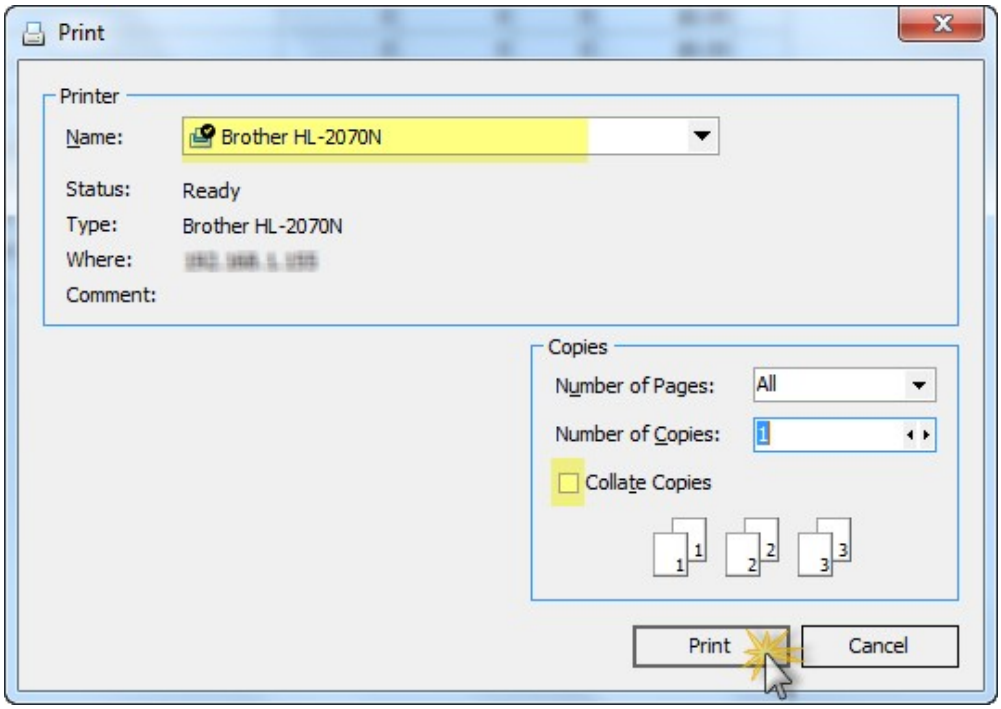
Even - Will print the even numbered pages.

Odd - Will print the odd numbered pages.

4. Select the number of copies you want made.

5. Select the the 'Collate Copies' check box if you are printing multiple copies and want the copies collated.

6. Click 'Print' to start the printing process. The window will close when the task is completed.



About Reports

Priority="64" SemiHidden="false" UnhideWhenUsed="false" Name="Medium Shading 2 Accent 4" />

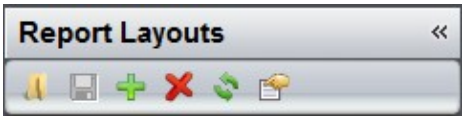
Reports are an importantl part of PlanSwift. They give you a way of presenting the data about your Items in a logical format. In the Reports tabs, you will have a default listing of different reports. Each report is specific to its filter such as the example shown here.

This example demonstrates a filter that is set to filter items that are takeoff or digitizer items only.

The Filter searches through your project and displays the information based on the conditions you set in your filter query. The default Reports in PlanSwift are organized by different types; Takeoff (all digitized items), Subcontract, Material, Labor, Equipment and Other. Basically the 5 common cost categories. Within these Reports, you can customize what information is displayed from the items with the Columns. Each column is specific to a certain property such as quantity, units, cost etc. There is no limit to how many columns are present, but the column should be the same name as an item property. To create a new column, simply click on the columns button at the top.

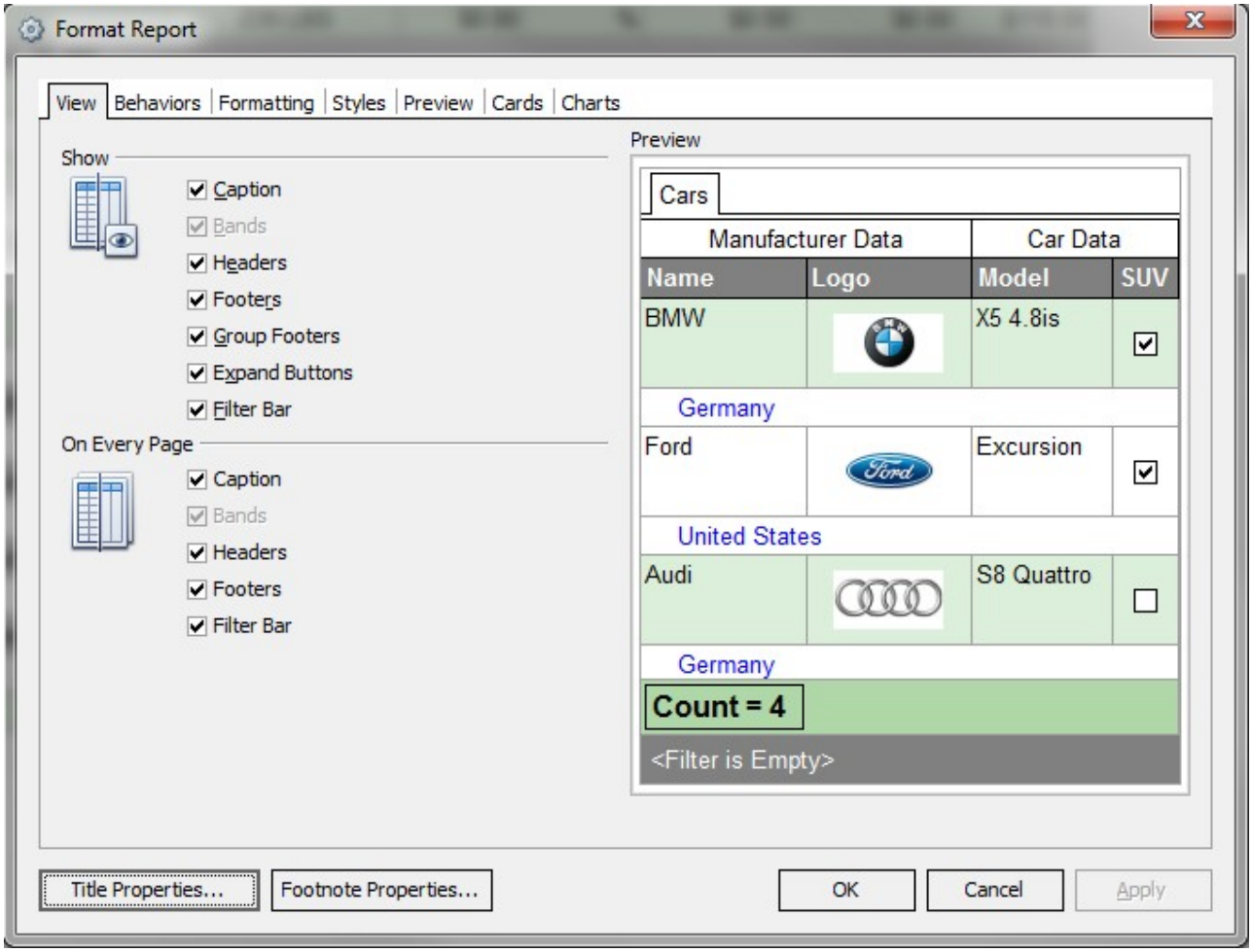
You can also select which columns you would like to be visible within a report. For more information about Columns, click here.

To create a new Report, first select an already existing Report, and then click on the green plus â +â button under Report Layouts.



Doing this will create an exact copy of that report, and from there you can customize that new report to fit your needs whether by the filter or visible columns.

To adjust the appearance of your reports, click on the Report Settings button.



More detailed information can be found here.

Report Filters

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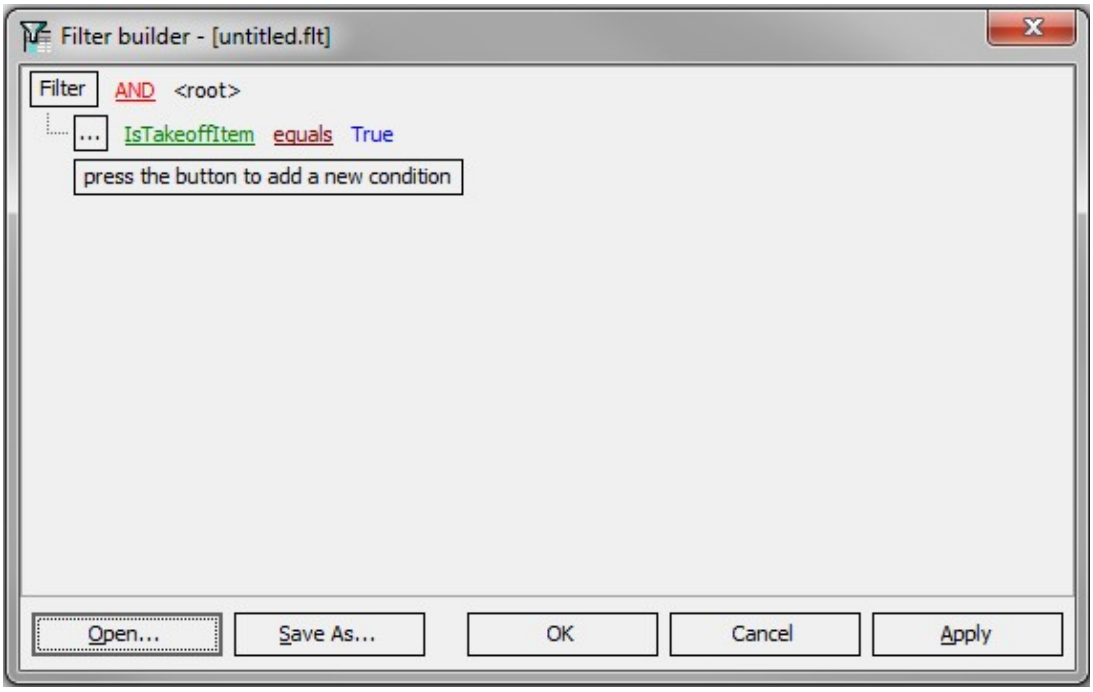
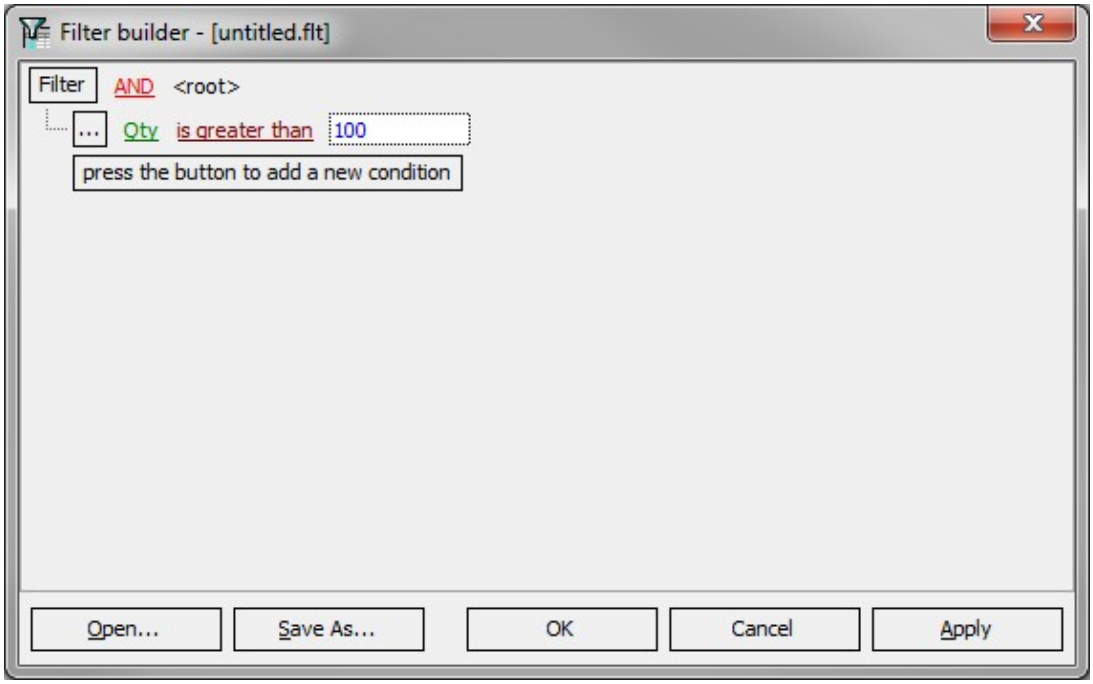
Report Filters determine what actually shows up in the report. PlanSwift uses the 5 typical cost categories; Subcontract, Material, Labor, Equipment and Other, you can create other categories as well. To edit the filter, click on the Customize button in the lower right corner of the screen.

This will bring up the Filter Builder window. Here, you will choose what data you want to filter, the operator for the filter, and the criteria youâ re filtering for.

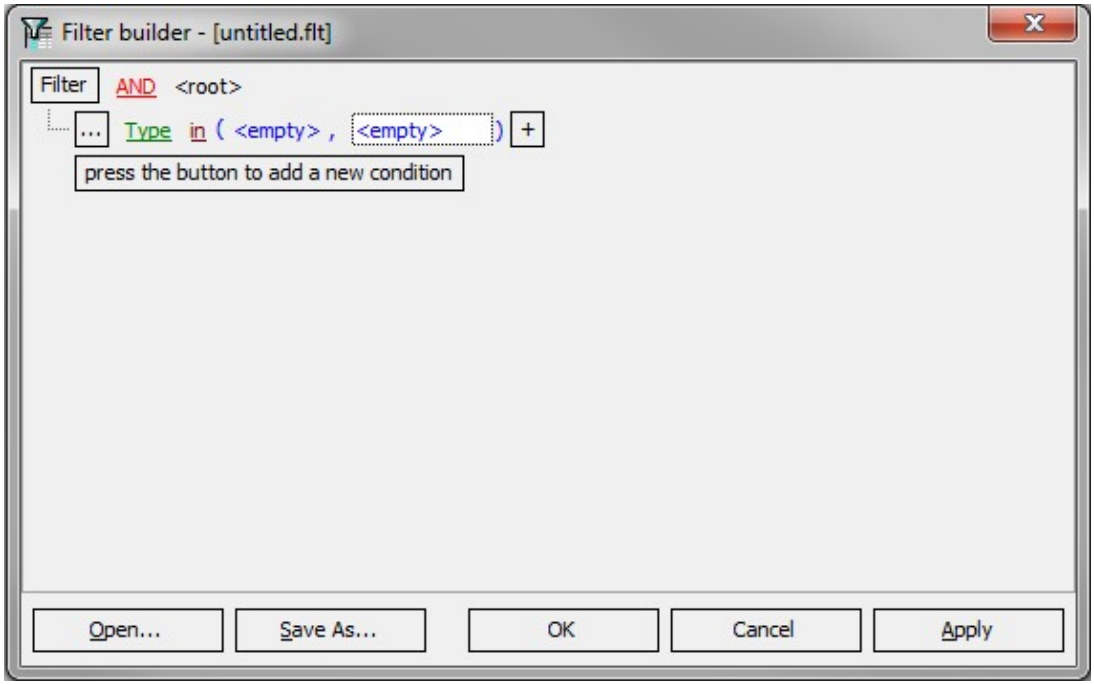


By clicking the green highlighted words, you can choose what you would like to filter, such as quantity, type, folder etc. This list is generated by what columns you have defined for the report. Then, by clicking the red highlighted word, you can select what operation you want the filter to perform. Finally, by clicking the blue highlighted word, you choose specifically what criteria your filter will follow.



For example, you can set a filter for Quaintly (Qty), is greater than, 100. This filter will show all the items where the Quantity is greater than 100.

At times, you can select more than one operation for the filter.



You can have as many different conditions to your filter as you would like, simply click on the new condition button. Once you have created your filter, click â applyâ in order to run the filter. You can save your filter for future use by clicking â Save asâ , and you can also view a history of recently used filters by clicking the down arrow next to the filter at the bottom of the screen.

Report Grouping

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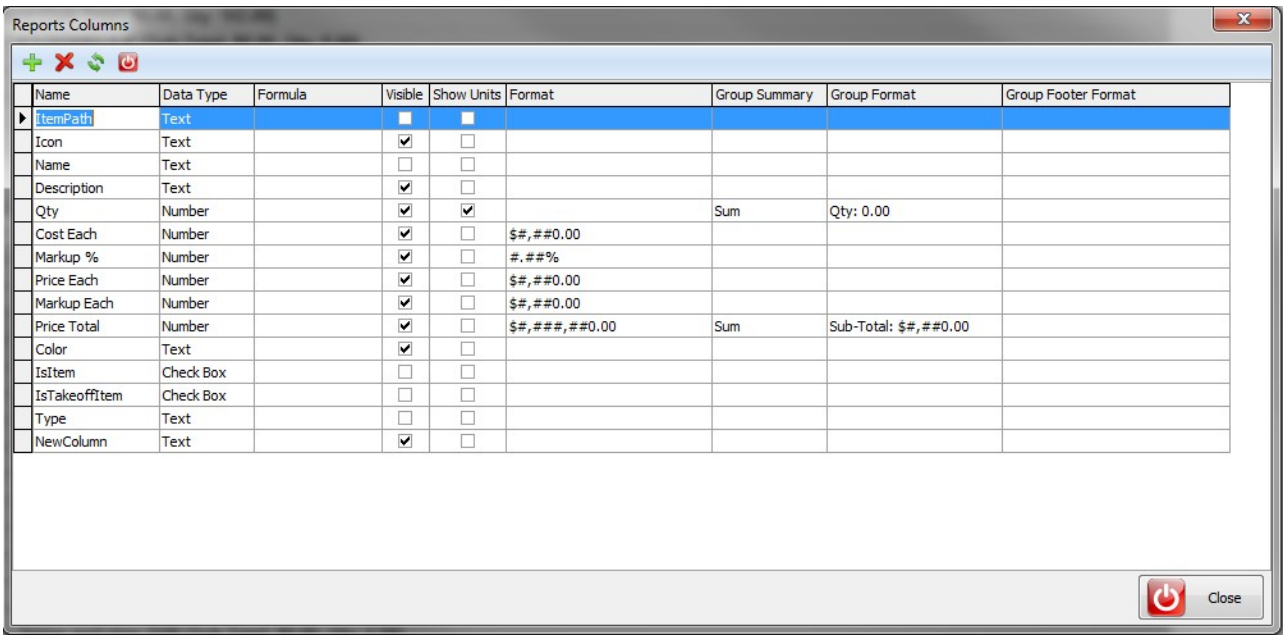
In your Reports, you have the ability to group your data by the column headings that are visible. The Grouping takes place in the light grey bar at the top of the report.

In order to group by a certain criteria, simply click and drag the column heading into the light grey bar. There is no limit to how many columns you have visible in a report. You may edit your columns by clicking on the Columns button.

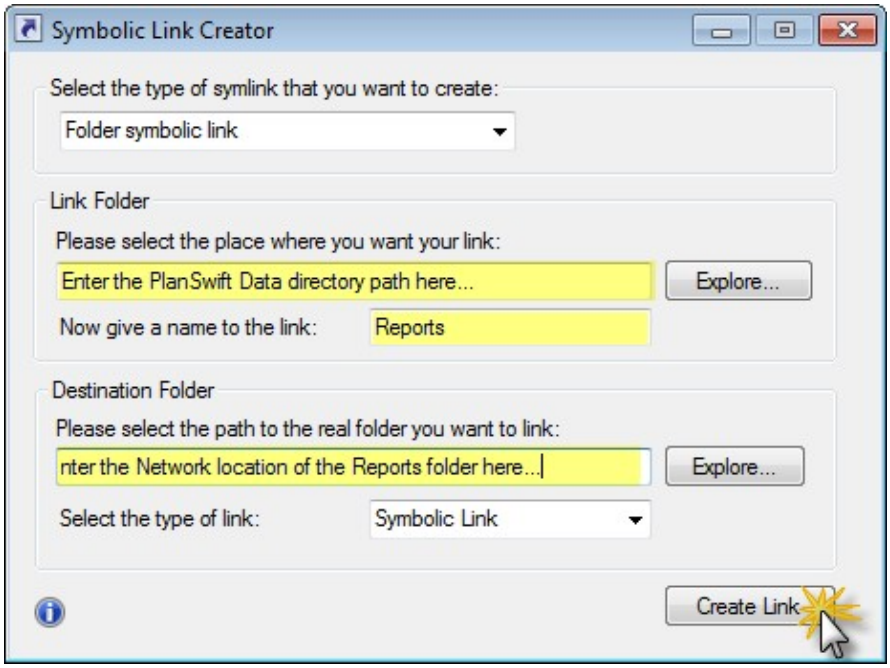


To add a new column, simply click the green â +â button and type in the column name. Be sure to set the correct data type when adding your columns.

By default, each column should match a property name inside your items; this is the only way to yield a result. A formula can also be created for a column by typing it in the Report Columns window. You can group by any column, and you may have as many groupings as you would like. Grouping is a great way to keep Reports clean and organized in order to make the data easily accessible.

Sharing Reports

In order to share your Reports with other users, search for PlanSwift 9 directory in your program files. Once inside the directory, click on data, you will see a Reports folder. From there, select the Reports you would like to share, and simply copy them by right clicking and selecting copy. The simplest method would be to just copy the reports to a thumb drive or onto a network location that is accessible from other computers, from there other users can copy and paste it into their Reports Directory on their computer.


Symbolic Link Creator
Select the type of symlink that you want to create:
Folder symbolic link
Link Folder
Please select the place where you want your link:
Enter the PlanSwift Data directory path here...
Explore...
Now give a name to the link:
Reports
Destination Folder
Please select the path to the real folder you want to link:
nter the Network location of the Reports folder here...
Explore...
Select the type of link:
Symbolic Link
Create Link

There is another way to share Reports by using a third party application available from Google. The program is called Symlinker.

Additional information regarding the SymLinker application used in this video can be found HERE
Please Note: This application is not supported by PlanSwift

This program creates a symbolic link, similar to a shortcut, which will read the contents of another directory, then places it into the directory which is located in your data directory.

1. Copy the report directory to a network location that all users have access to (this is only done once)
2. Once copied delete the original reports folder in the PlanSwift Data directory
3. Run the SymLinker application
4. Enter the information as indicated in the image
5. Press the Create Link button.
6. You will need to create a symlink on all of the other computers that need it.
7. Restart PlanSwift

New Report

Creating a new custom Report in PlanSwift allows you to view data and information that fits the criteria you need. If you go to the Reports tab now, you will see all of the default reports that PlanSwift offers, as well as any custom reports that you may have created. Select one of the reports format that is closest to what you are looking for, and click the green â +â button under Report Layouts. This will open a window where you can rename the new Report you are about to customize. From there start filtering based on what you would like to see. Essentially, Reports have a few key components; Filters, Columns and Grouping. These allow you to edit the report to show what information you need and how it is organized.

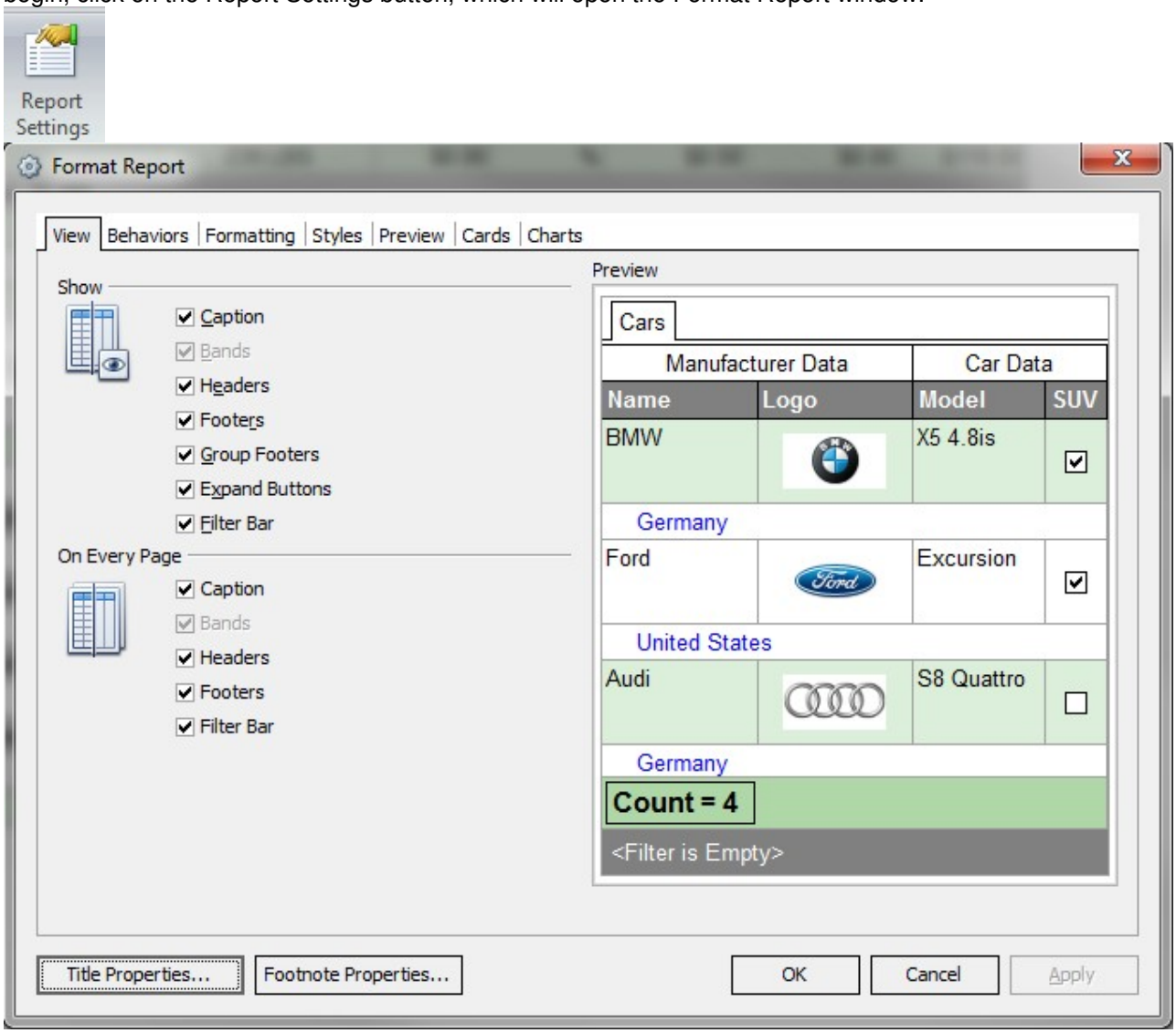
Filters search through all of your data and extract information based on the criteria that you set thus reducing the results to only the items you need. Columns will report the property values that are stored on the items you filtered for. Grouping allows you to organize the results in a meaningful way.

For more information about Filters, click here or watch the Video Here.

For more information about Grouping & Columns, click here.

Report Formatting

Report Formatting refers to the appearance of the actual report. This allows you to edit fonts, color schemes, page set up, headers and footers. Each report is handled independently, so every report can be different. To begin, click on the Report Settings button, which will open the Format Report window.



There are several tabs in that window, some of which are not used inside PlanSwift. The main tabs that most user will edit are the View, Behaviors and Styles. The first tab is the View tab. This tab allows you to edit what report components are visible. The next tab is the Behaviors tab. Here, you can edit how your report will behave. For example, the Process Selection option will make the report show only what you have selected within that report. The Expanding options will automatically expand all sub items that are collapsed so they are able to be seen when printed. Under the Formatting Tab, it is recommended to leave it set at Ultra Flat. The Styles tab is where you can edit fonts and color schemes.
Add a title to your Report, click on the Title Properties button at the bottom of the window. You can use properties in the Title Properties and Footnote Properties. For example, to add the Job Name to the report title simply enter [\Job\Name].

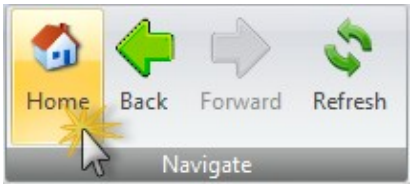
Another option for formatting your report is Page Setup. Click on the Page Setup button to open the window where you can adjust how the Report will print. Such options include printing the Report portrait or landscape, adjusting margins, headers and footers, Page size and Scaling.

Help

Home

The 'Home' button will return you to the main help screen from anywhere in the help screens.

1. Click the 'Home' button to return.



Help Back and Forward

The 'Back' and 'Forward' buttons in the Help tab allow you to navigate backwards or forwards one page within the help sections.

1. To move back one page click the 'Back' button.

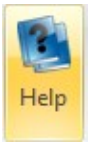
2. To move forward one page click the 'Forward' button.

Refresh

The 'Refresh' button updates the content on the help screen you are in.

1. To updated the content click the 'Refresh' button.

Help

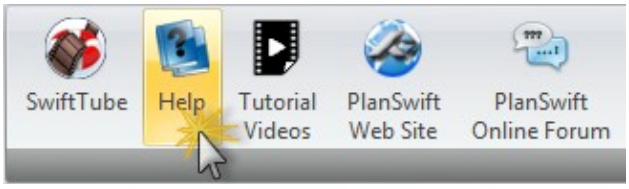


OR

The 'Help' button will allow you to access the PlanSwift Knowledgebase from inside PlanSwift.

1. Select the 'Help' button.

2. From inside the knowledgebase you can search information or browse sections of content.



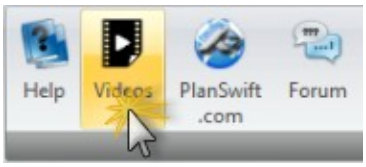
OR

Videos

OR

The tutorial videos contains all the How-To videos to show you how to accomplish any task you want.

1. From inside PlanSwift to view How-To videos select the 'Tutorial Videos' button.



OR

2. You can search Swift for the information you would like to view, or select the Category of view you want.

Most Viewed - The most often and popular videos in SwiftTube.

The Basics - Videos dealing with general subjects used by all PlanSwift users.

Parts & Assemblies - Videos showing how to work with parts and assemblies in estimating and takeoffs.

Enhanced Features - Videos showing how to used special and useful features of PlanSwift.

Advanced Features - Videos show how to use complex PlanSwift features.

Plugins - Videos dealing with how to install and use plugins in PlanSwift.

TrussSwift - Videos showing how to use TrussSwift.

PlanSwift.com

The 'PlanSwift Web Site' button will allow you to access PlanSwift.com from inside PlanSwift Estimating and Takeoff Software.

1. To access PlanSwift.com select the 'PlanSwift Web Site' button. As long as you have an internet connection you will be connected to the main site.

PlanSwift Online Forum

OR

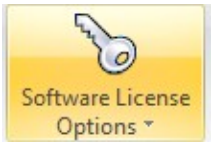
The PlanSwift Online Forum is your place to connect with other users of PlanSwift to share and learn new ideas. You can also connect with PlanSwift experts inside the forum to gain great information.

1. To connect with the forum from inside PlanSwift you need to have an internet connect then select the 'PlanSwift Online Forum' button.

OR

2. You will need to register to become a forum member to post questions and comments. You can register by clicking here.

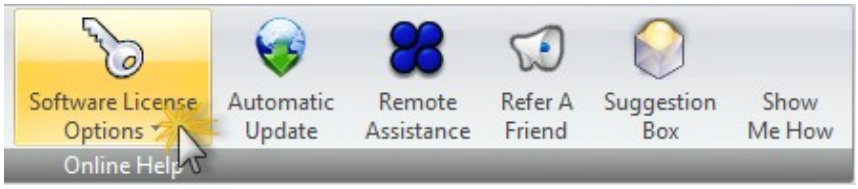
Software License Options



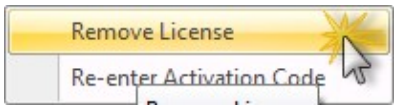
From withing the Software License Option section you can remove or active your PlanSwift software license.

Remove Software License

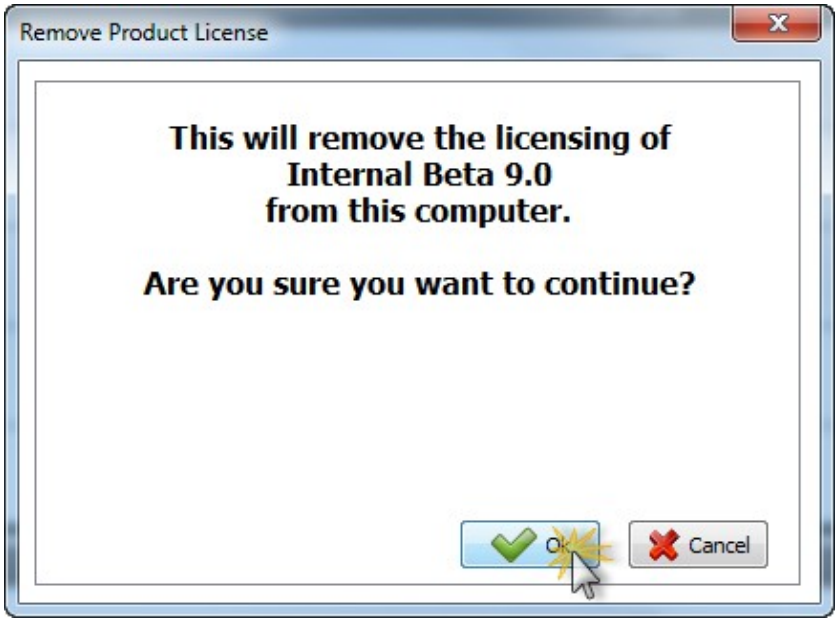
1. Select the 'Software License Option' button.



2. To remove your license select the 'Remove License' option drop down button.



3. Click 'OK' to confirm you want to remove your license.

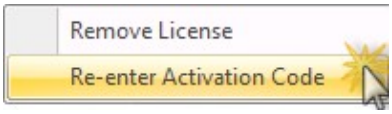


4. Your license will be removed, click 'OK' to close the window.

Re-Ener Activation Code

1. Select the 'Software License Option' button.

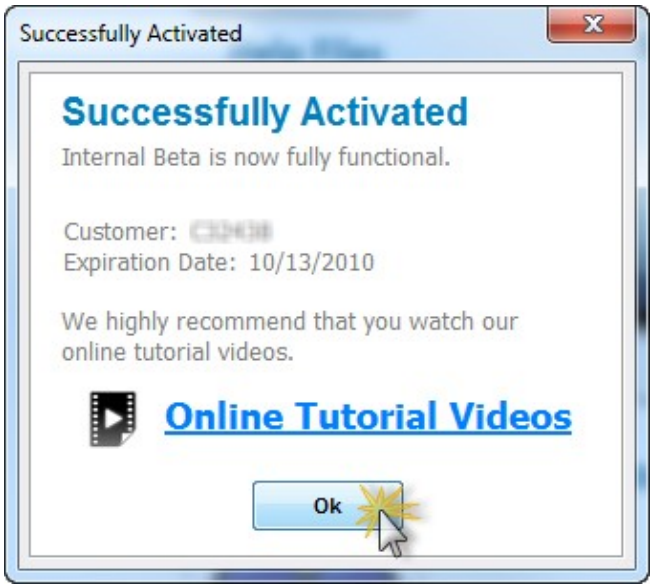
2. To Re-enter your activation code select the 'Re-enter Activation Code' button.



3. To automatically active PlanSwift enter your Customer # and Pin then click 'Activate'.

Activate Product
Activate Product
Product: Internal Beta 9.0
Customer #:
Pin #:
Activate
If for any reason this form is having troubles, you can manually activate the software with an activation code.
Manual Activation

4. You wil be shown the successful activation window. To close the window click 'OK'.



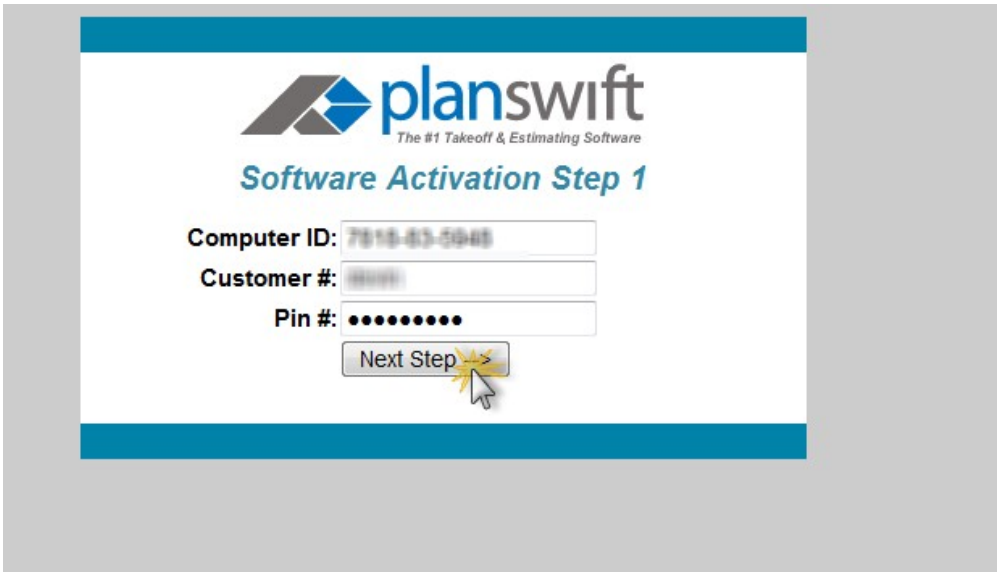
5. If you have troubles you can Manually activate PlanSwift by selecting the 'Manual Activation' button.

6. Make note of your Computer ID.

7. Either click on the link or enter https://www.planswift.com/activate in your web browser to go to PlanSwift activation page.

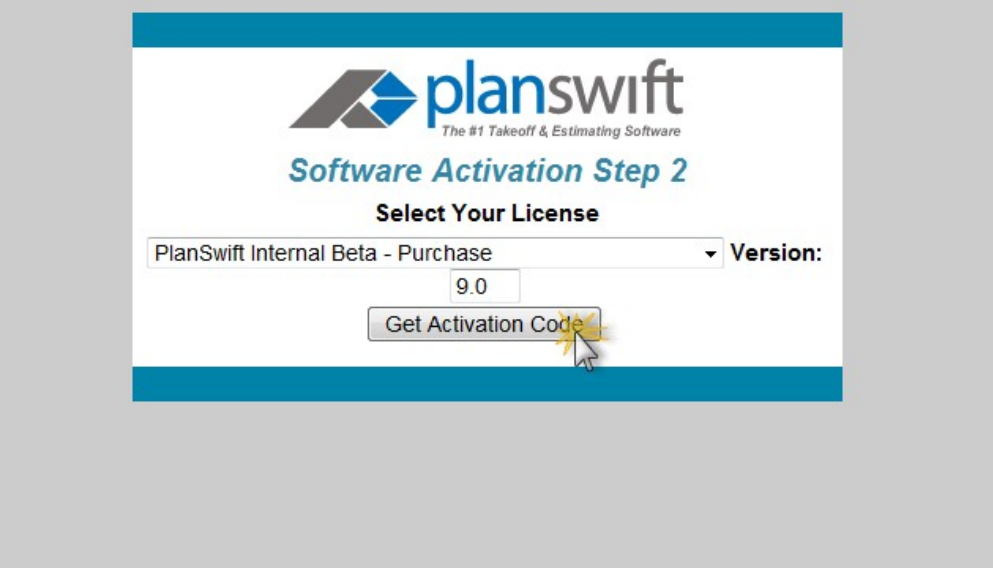
8. On PlanSwift's activation page enter your computer id from step 6, your customer number and pin number.

9. Click the 'Next Step' button to continue.

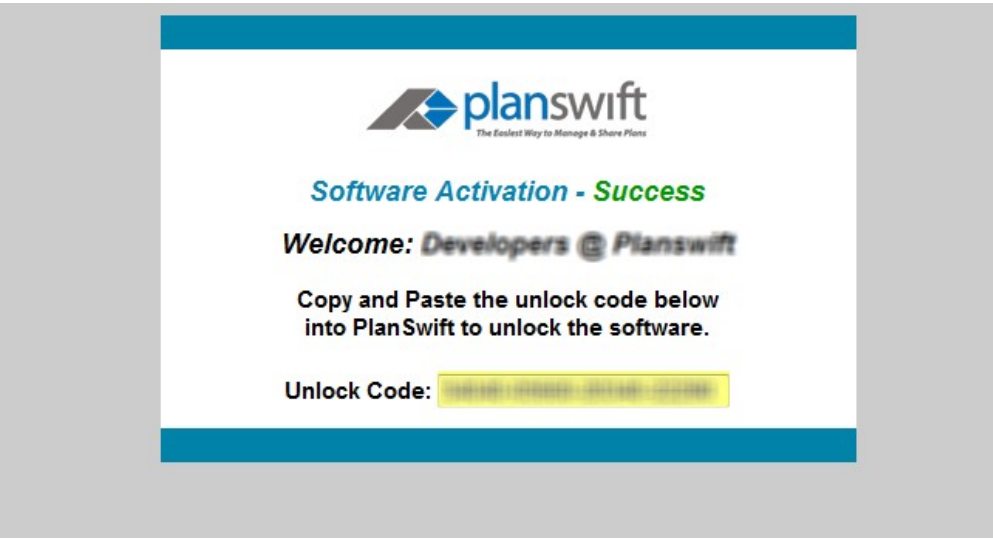


10. Select your license from the drop down menu and enter teh version software you have.

11. Click the 'Get Activation Code' to get your code.



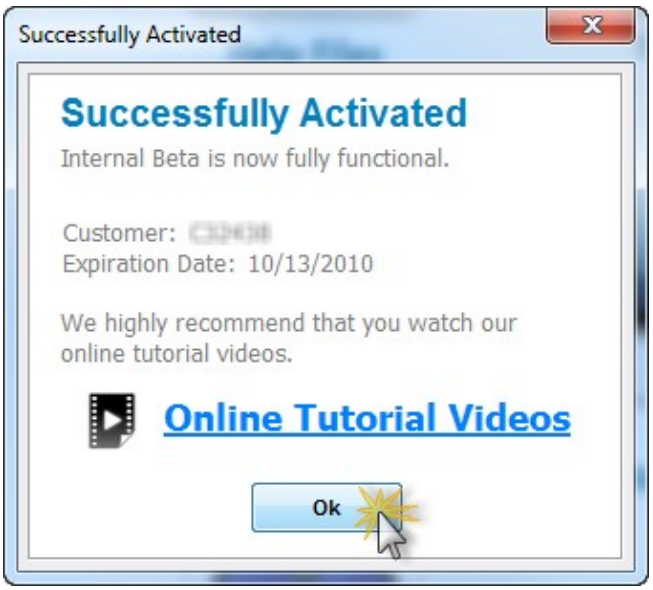
12. When successful you will given your Unlock Code. Make note of it before leave this page.


planswift
Software Activation - Success
Welcome: Developers @ Planswift
Copy and Paste the unlock code below
into PlanSwift to unlock the software.
Unlock Code:

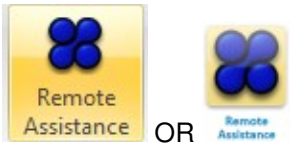
13. In PlanSwift enter the Unlock Code you received in step 12 into the Activation code box.

14. Click the 'Activate' button to activate your copy of PlanSwift.

15. When complete click 'OK' to close this window, or go to the online videos.

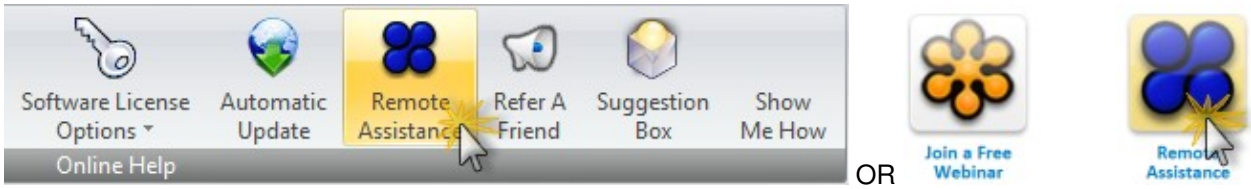


Remote Assistance

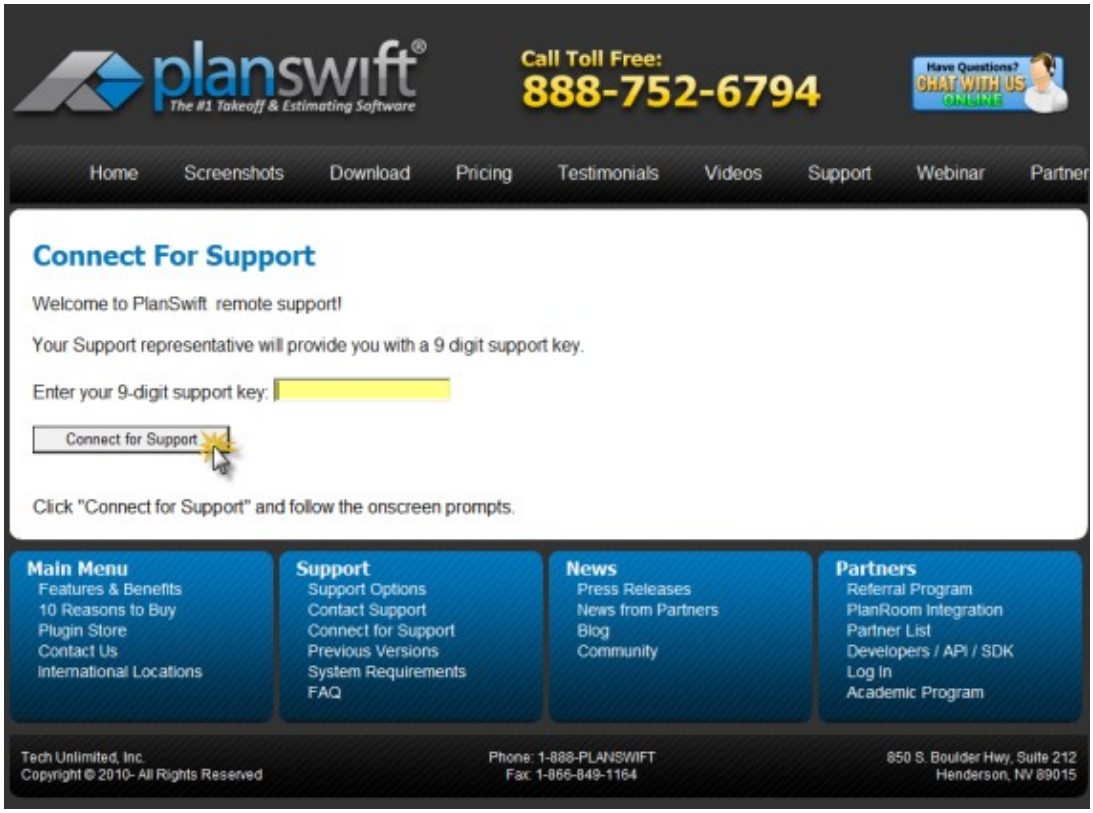


PlanSwift support personnel can assist you remotely from right inside your software.

1. Select the 'Remote Assistance' button to begin.



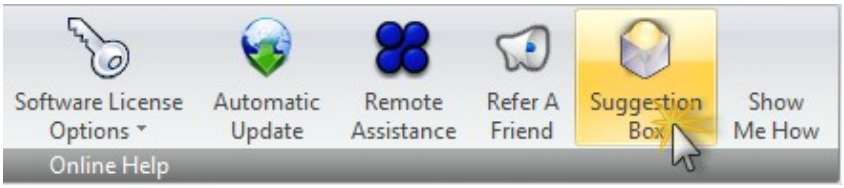
2. Enter your Customer number or name.
3. Your support representative will provide you with the support key. Enter it when asked.
4. Click the 'Connect for Support' button to begin your session.
5. You will be automatically connect with remote assistance.



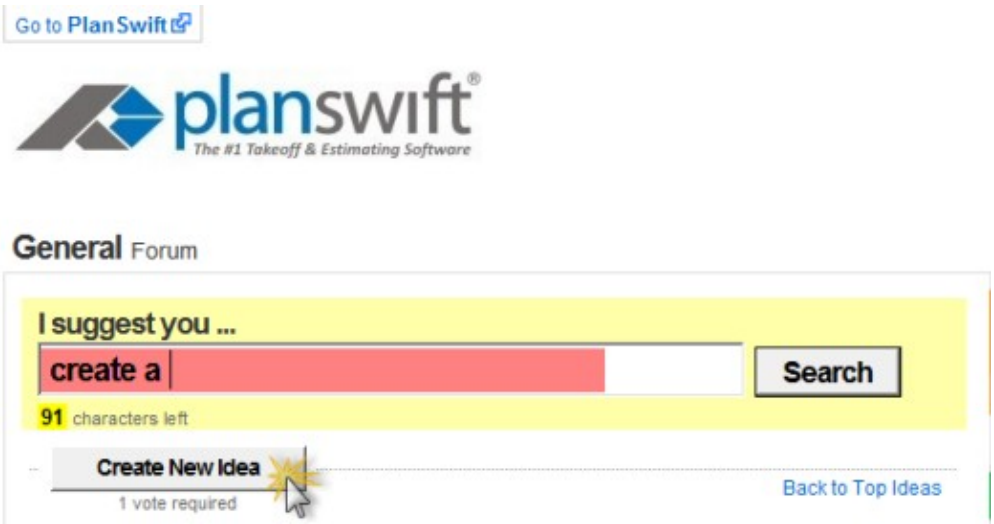
Suggestion Box

At PlanSwift we are always improving our software to make it better for you. As part of that we you like to hear from you about what you would like to see improved.

1. To make a suggestion select the 'Suggestion Box' button.



2. Enter your suggestion for PlanSwift in the box then click 'Create New Idea'.



Thank you for taking the time to help with improving PlanSwift

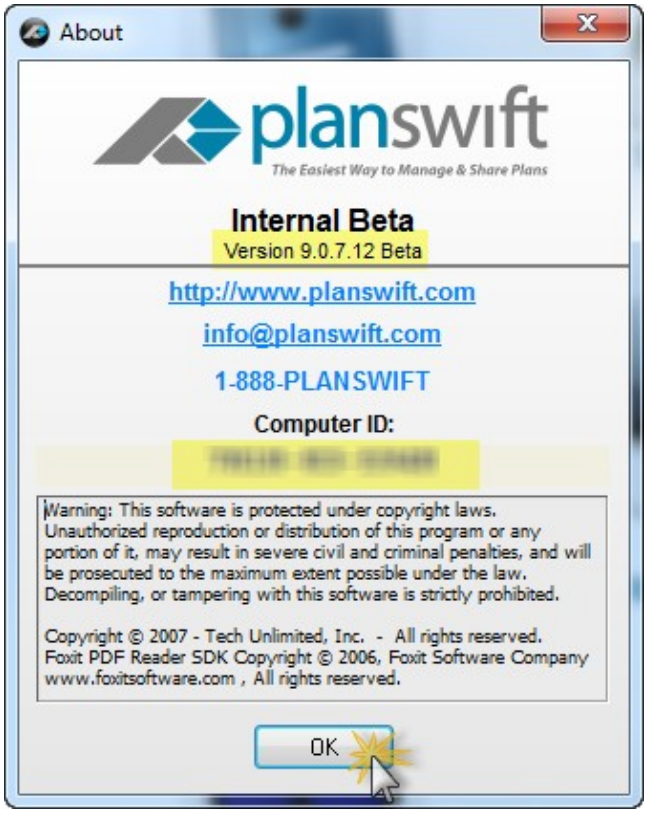
About

To learn about basic information regarding your copy of PlanSwift use the 'About' button.

1. Select the 'About' button to begin.

2. A new window will display your current version and update number. Here being PlanSwift 9.0 updated version 7.12. You can also find your computer ID here.

3. When done, click the 'OK' button to close the window.


About
planswift
The Easiest Way to Manage & Share Plans
Internal Beta
Version 9.0.7.12 Beta
http://www.planswift.com
info@planswift.com
1-888-PLANSWIFT
Computer ID:
Warning: This software is protected under copyright laws.
Unauthorized reproduction or distribution of this program or any
portion of it, may result in severe civil and criminal penalties, and will
be prosecuted to the maximum extent possible under the law.
Decompiling, or tampering with this software is strictly prohibited.
Copyright © 2007 - Tech Unlimited, Inc. - All rights reserved.
Foxit PDF Reader SDK Copyright © 2006, Foxit Software Company
www.foxitsoftware.com , All rights reserved.
OK

Online Support Chat

PlanSwift allow you to have an online chat with our support or sales staff from inside your software.

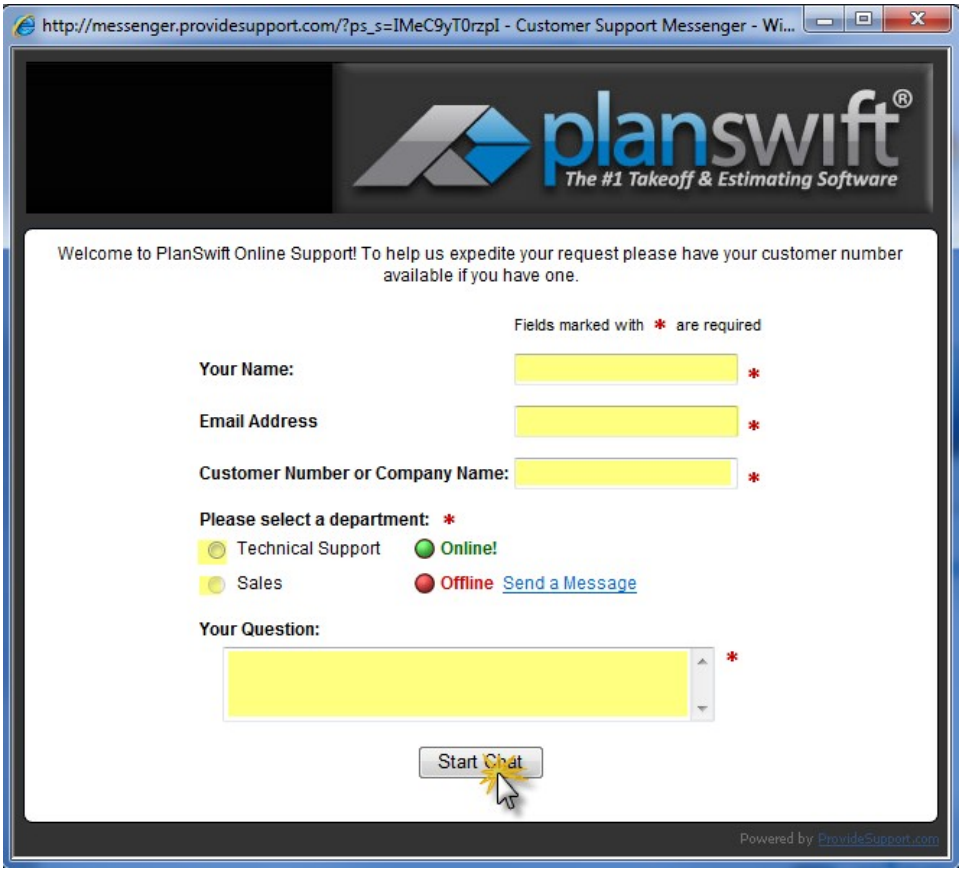
1. Select the 'Online Support Chat' button to begin.

2. Enter your name, address, and customer number or name and select the department you would like to chat with.

3. Enter your initial question.

4. Click the 'Start Chat' button.

5. Your support person will start your chat momentarily.


http://messenger.providesupport.com/?ps_s=IMeC9yT0rzpI - Customer Support Messenger - Wi...
planswift®
The #1 Takeoff & Estimating Software
Welcome to PlanSwift Online Support! To help us expedite your request please have your customer number available if you have one.
Fields marked with * are required
Your Name:
Email Address
Customer Number or Company Name:
Please select a department: *
Technical Support
Online!
Sales
Offline
Send a Message
Your Question:
Start Chat
Powered by ProvideSupport.com

FAQ - Frequently Asked Questions

Often you will have the same question as many other customers. We have assembled the answers to these in the Frequently Asked Question (FAQ) section of PlanSwift Online Help System.

1. Ensure you have internet access.

2. To access the FAQs select the FAQ button.

3. Your page in PlanSwift will access the PlanSwift Online Help System FAQ section.

System Requirements

For your current version of PlanSwift to work optimally you should use in on a computer with at least the minimum system requirements.

1. To access the current system requirements select the 'System Requirements' button.

2. Confirm your computer meets the minimum system requirements listed.

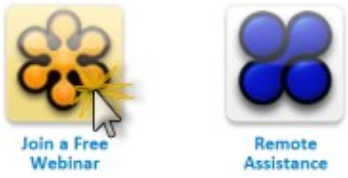
Please Note: PlanSwift does not run on the Macintosh operating system. Please consider using a Windows emulator like Parallels, or you can try out our web based version at www.OnlineTakeoff.com

Join a Free Webinar

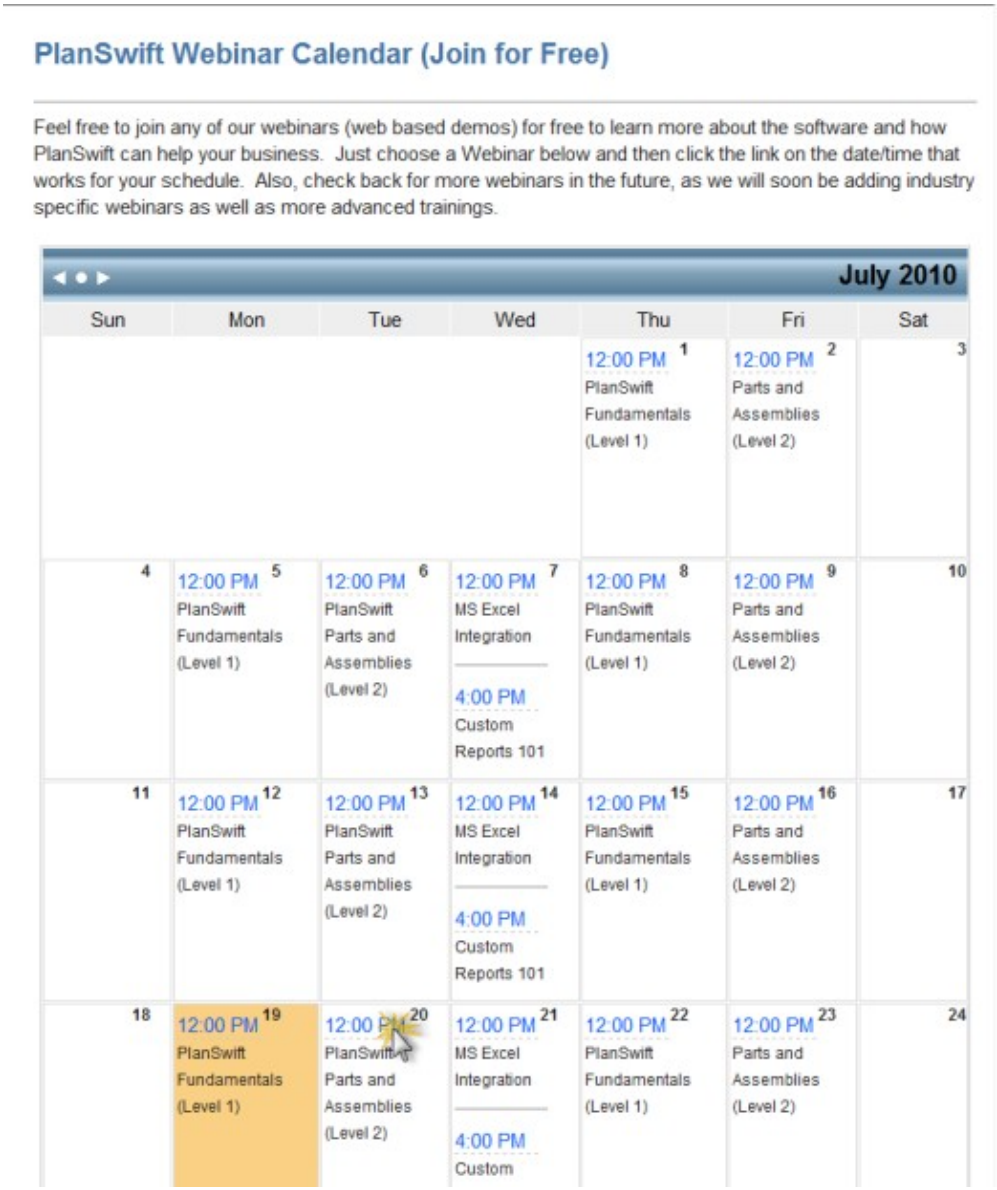
You can sign up for and attend free PlanSwift training videos right from inside your program.

1. Confirm you have an internet connection.

2. Select the 'Join a Free Webinar' button.



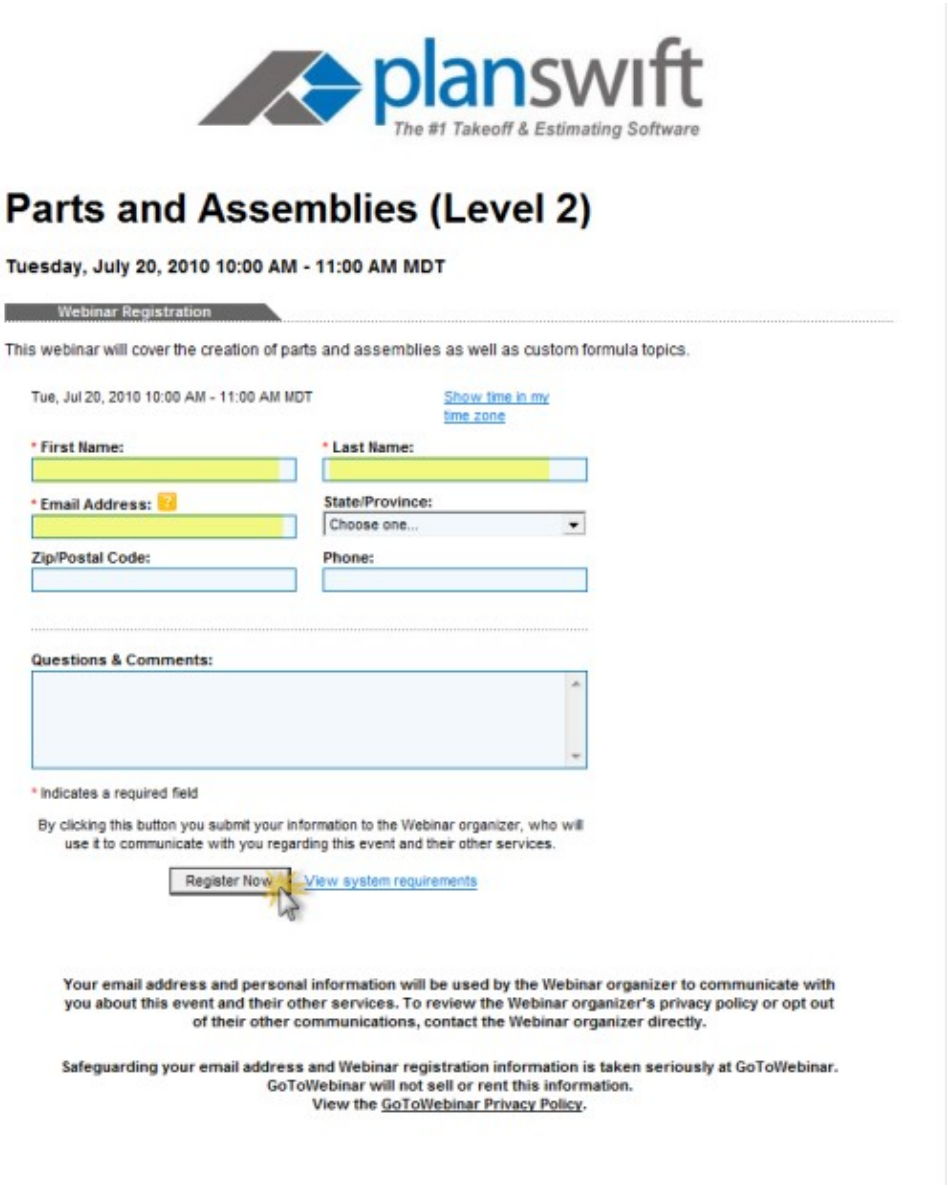
3. Select the training webinar you are interested in. You can repeat this process to register for multiple webinars.


PlanSwift Webinar Calendar (Join for Free)
Feel free to join any of our webinars (web based demos) for free to learn more about the software and how PlanSwift can help your business. Just choose a Webinar below and then click the link on the date/time that works for your schedule. Also, check back for more webinars in the future, as we will soon be adding industry specific webinars as well as more advanced trainings.
July 2010
Sun
Mon
Tue
Wed
Thu
Fri
Sat
12:00 PM 1 PlanSwift Fundamentals (Level 1)
12:00 PM 2 Parts and Assemblies (Level 2)
3
4
12:00 PM 5 PlanSwift Fundamentals (Level 1)
12:00 PM 6 PlanSwift Parts and Assemblies (Level 2)
12:00 PM 7 MS Excel Integration
4:00 PM Custom Reports 101
12:00 PM 8 PlanSwift Fundamentals (Level 1)
12:00 PM 9 Parts and Assemblies (Level 2)
10
11
12:00 PM 12 PlanSwift Fundamentals (Level 1)
12:00 PM 13 PlanSwift Parts and Assemblies (Level 2)
12:00 PM 14 MS Excel Integration
4:00 PM Custom Reports 101
12:00 PM 15 PlanSwift Fundamentals (Level 1)
12:00 PM 16 Parts and Assemblies (Level 2)
17
18
12:00 PM 19 PlanSwift Fundamentals (Level 1)
12:00 PM 20 PlanSwift Parts and Assemblies (Level 2)
12:00 PM 21 MS Excel Integration
4:00 PM Custom
12:00 PM 22 PlanSwift Fundamentals (Level 1)
12:00 PM 23 Parts and Assemblies (Level 2)
24

4. Complete the required registration information.

Please note a confirmation email and reminder email will be sent to the email address you provide, so please use one that you will receive.

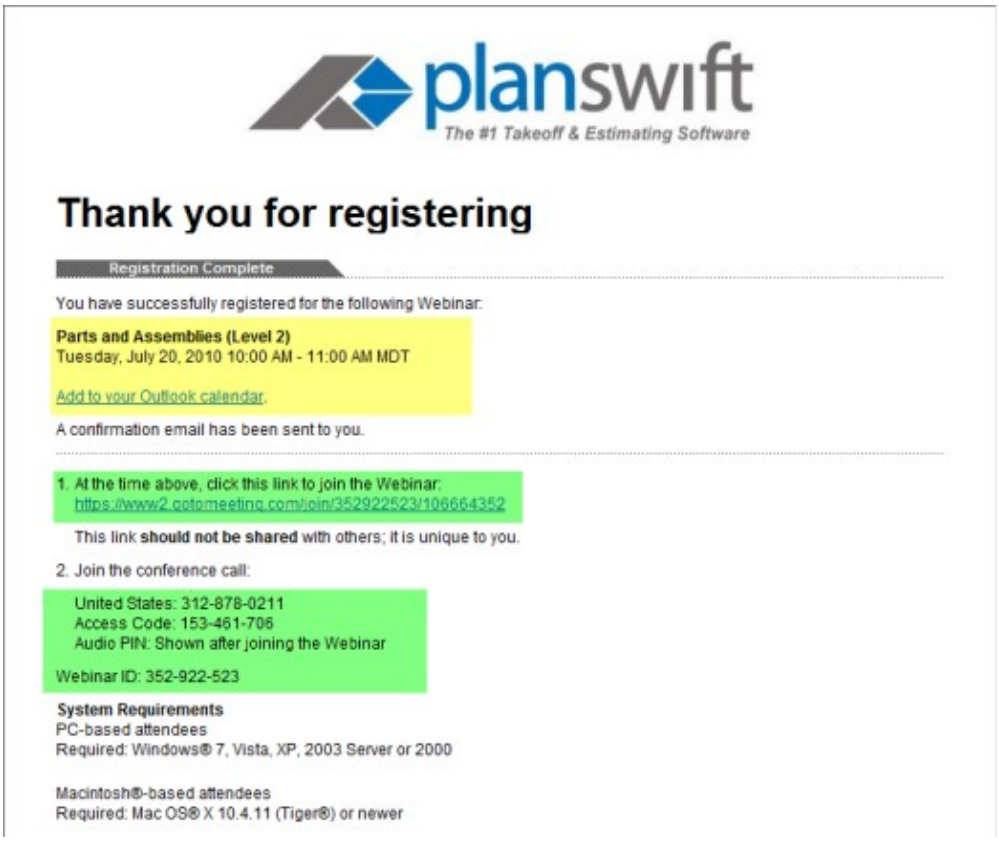
5. Click the 'Register Now' button to continue. ***(Please note: All of our webinars are scheduled MST you can show the time in your time zone by pressing the 'Show Time in My Time Zone' link)***


planswift
The #1 Takeoff & Estimating Software
Parts and Assemblies (Level 2)
Tuesday, July 20, 2010 10:00 AM - 11:00 AM MDT
Webinar Registration
This webinar will cover the creation of parts and assemblies as well as custom formula topics.
Tue, Jul 20, 2010 10:00 AM - 11:00 AM MDT
Show time in my time zone
* First Name:
* Last Name:
* Email Address:
State/Province:
Choose one...
Zip/Postal Code:
Phone:
Questions & Comments:
* Indicates a required field
By clicking this button you submit your information to the Webinar organizer, who will use it to communicate with you regarding this event and their other services.
Register Now
View system requirements
Your email address and personal information will be used by the Webinar organizer to communicate with you about this event and their other services. To review the Webinar organizer's privacy policy or opt out of their other communications, contact the Webinar organizer directly.
Safeguarding your email address and Webinar registration information is taken seriously at GoToWebinar. GoToWebinar will not sell or rent this information.
View the GoToWebinar Privacy Policy.

6. Make note of the time of the webinar. Generally our class times are in the Mountain Time Zone.

7. At the time of the meeting you can either select the link in this or the other messages or go to www.gotomeeting.com, and 'Join a Meeting'.

Audio is provided along with the webinar over your computer, however if you would prefer you can call into the webinar at the number below and enter the Webinar ID.



planswift
The #1 Takeoff & Estimating Software

Thank you for registering

Registration Complete

You have successfully registered for the following Webinar:

Parts and Assemblies (Level 2)
Tuesday, July 20, 2010 10:00 AM - 11:00 AM MDT

Add to your Outlook calendar.

A confirmation email has been sent to you.

1. At the time above, click this link to join the Webinar:
   https://www2.gotomeeting.com/join/352922523/106664352

   This link **should not be shared** with others; it is unique to you.

2. Join the conference call:

   United States: 312-878-0211
   Access Code: 153-461-706
   Audio PIN: Shown after joining the Webinar

Webinar ID: 352-922-523

System Requirements
PC-based attendees
Required: Windows® 7, Vista, XP, 2003 Server or 2000

Macintosh®-based attendees
Required: Mac OS® X 10.4.11 (Tiger®) or newer

The 'How To' Section

This section will provide you with instruction of how to perform specific tasks.

Import a Job from a PlanSwift E-Mail

1. Open the PlanSwift email in your default email client (Outlook, Yahoo, Gmail, etc...)
   The email should look something like below
   A PlanSwiftâ ¢ user has sent you some files.

   Click the following link to download:
   http://share.planswift.com/download/?file=J86E1SS3-7AN8-HD4S-C06A-4LIVW6VBBW5
   This file will be available for download for 30 days from today (expiring 04/08/11).

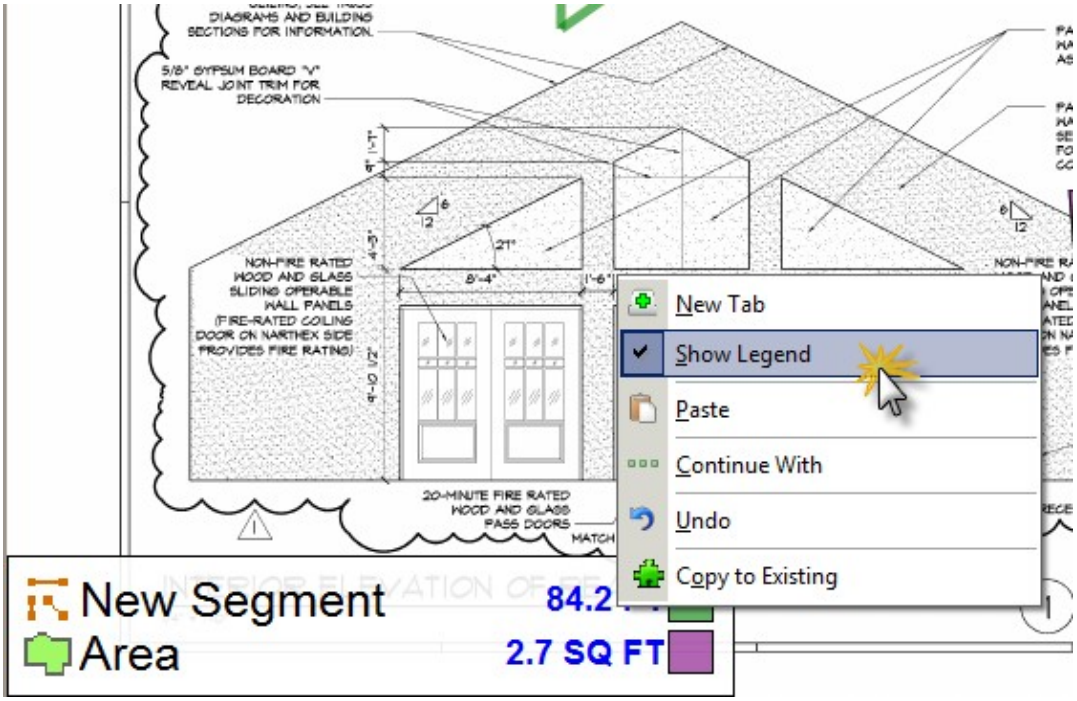
   PlanSwift is the #1 takeoff and estimating software, and it comes with powerful, yet easy to use, on screen digitizer and takeoff tools. Discover how much time you can save with Planswift. Available for download at http://www.planswift.com/requesttrial
2. Click the First link in the email
3. A dialog box will appear asking you to save the file. Save the file to your desktop or location of your choice
4. Open PlanSwift if it is not already open. (If you do not have a copy of PlanSwift click here)
5. Click on the Tab named "Other" and click the Unzip SwiftJob button.
6. The Open dialog will appear. Select the file you saved in step 3 and press Open
7. The Import dialog will appear. Select your storage location (The default location is your local computer)
8. Name The Job (IMPORTANT: Rename the job to avoid duplicates)
9. Press Ok

This will now start the import process. Congradulations you have just imported your first job.

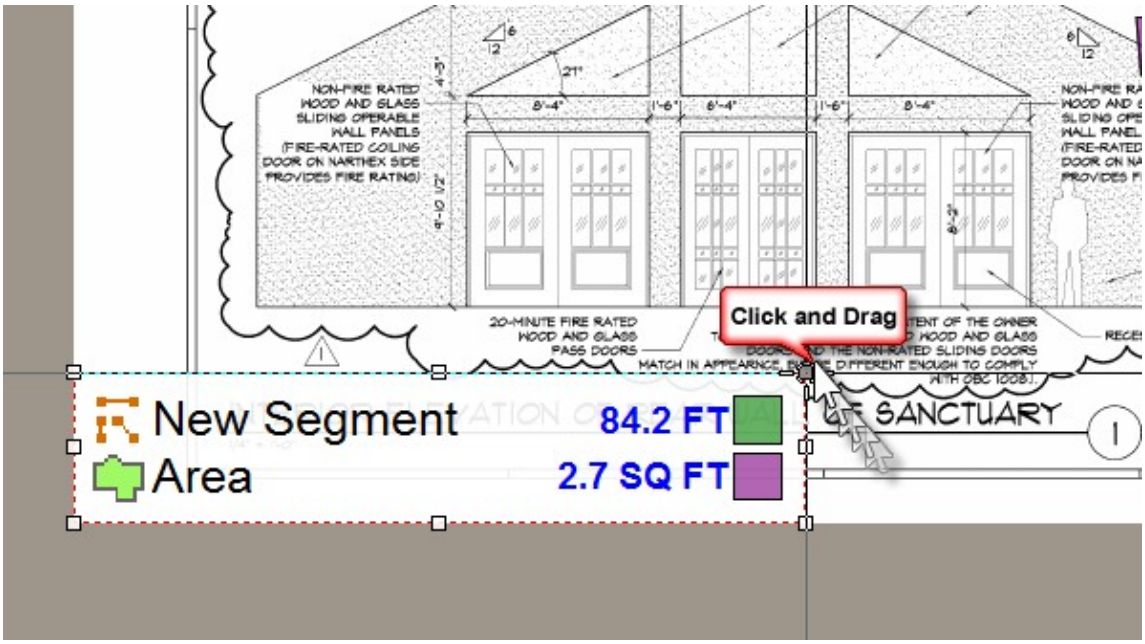
Display a legend on your plan images.

To display a legend for the takeoff that you have done on the plan image take the following steps:

1. Right click on any white space (un-digitized area) on the plan image
2. Select 'Show Legend' the check mark indicates that it is currently visible
3. Clicking a second time will hide the legend.



If the legend is visible it will print when using the Print Visible Items option on the print menu.



To resize the legend simply left click on it to select it then left click on one of the square Nodes and drag it to the desired position. Text and icons will dynamically resize.

Installation & Set-up

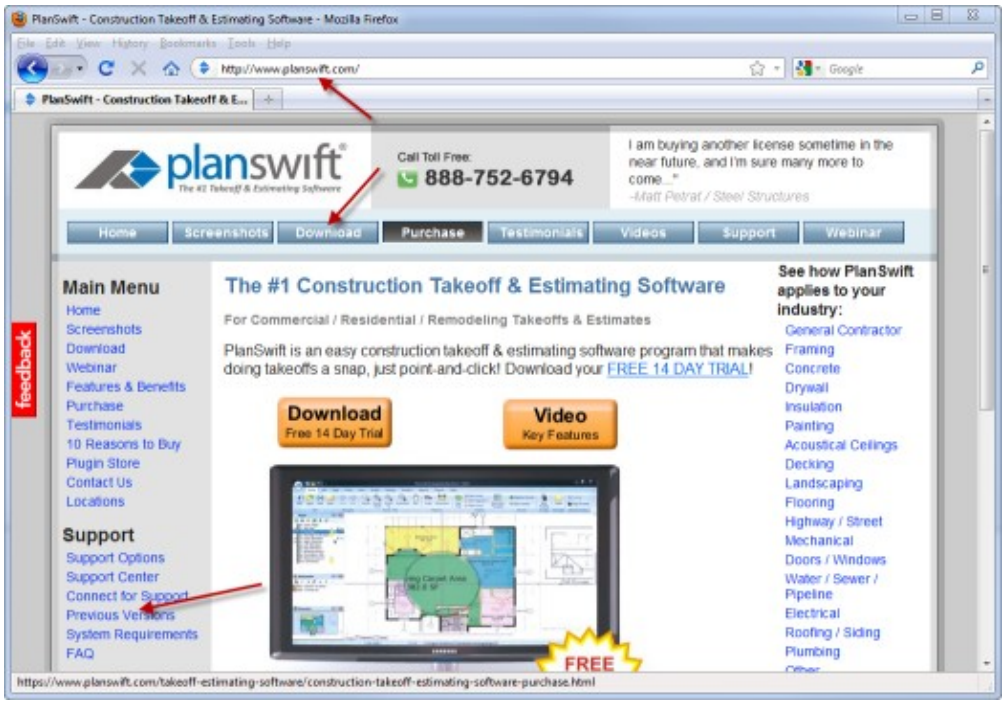
Installing PlanSwift On Your Computer

Installing PlanSwift

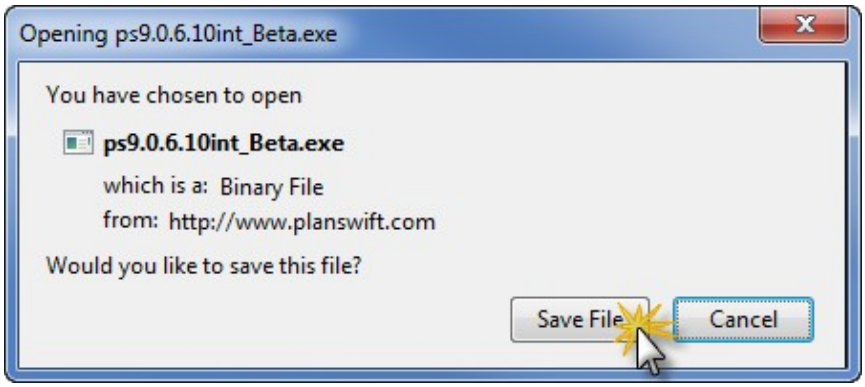
Installing PlanSwift on your system is fast and simple. This guide will explain how to do it.

Make sure your system meets our requirements before continuing to the next step.

1. In your web browser navigate to **http://www.planswift.com** and go to the **'Download'** page if you are downloading a new trial or you can go to the **'Previous Versions'** to download the current or previously released versions.

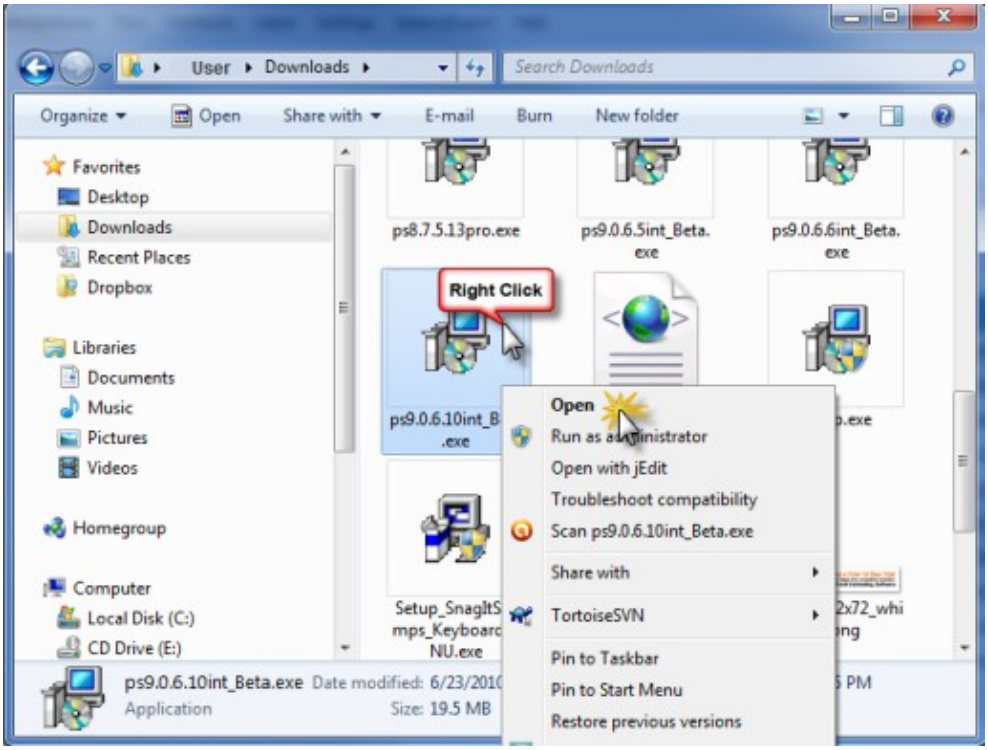


2. Once you have selected your method of download, depending on you web browser and security settings you will be prompted to 'Run' or 'Save' the excecutable file. Click Save. The file will be saved to the default location that your web browser is set to save to.

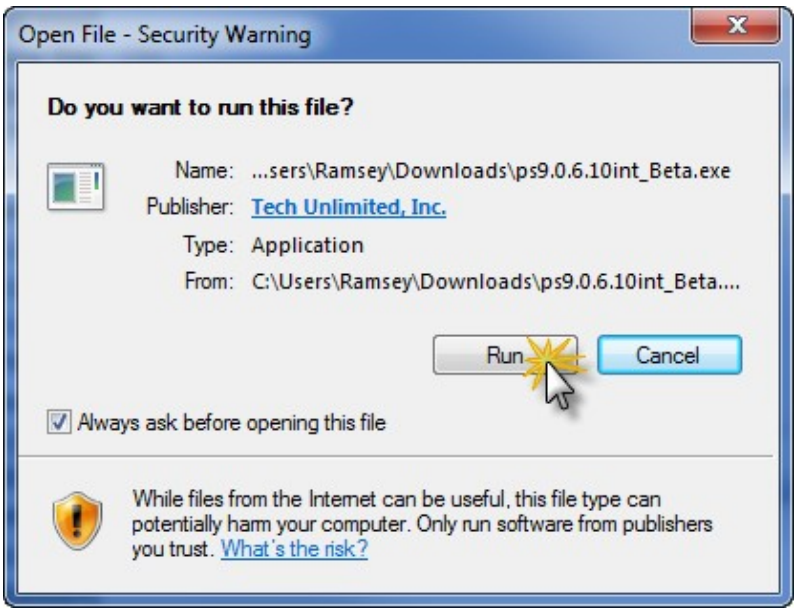


3. When the file has saved to your specified directory browse your computer to where the file is located on

your hard drive. Right click on the PlanSwift executable and select 'Open'.



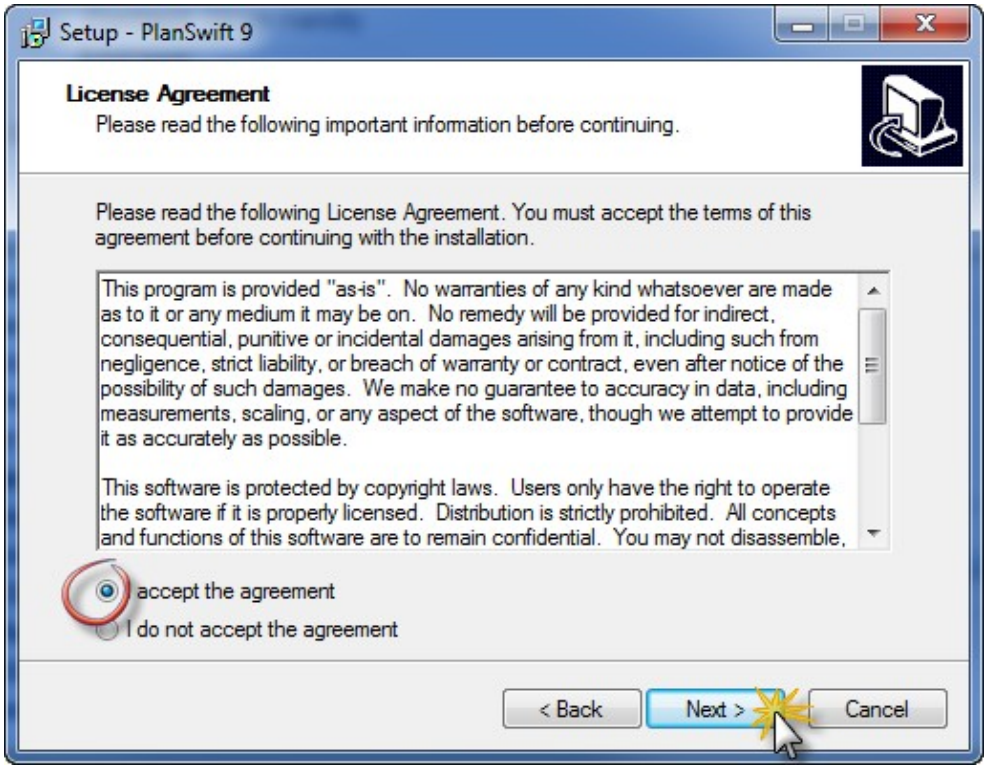
4. When prompted click 'Run'. Depending the version of Windows you are using you may receive a slightly different message here. Most users on Windows Vista or Windows 7 will likely receive the Windows 'User Access Control' warning such as "Do You want to allow the following program to make changes to your computer?" Just click 'Yes' if you receive such a message.


Open File - Security Warning
Do you want to run this file?
Name: ...sers\Ramsey\Downloads\ps9.0.6.10int_Beta.exe
Publisher: Tech Unlimited, Inc.
Type: Application
From: C:\Users\Ramsey\Downloads\ps9.0.6.10int_Beta....
Run
Cancel
Always ask before opening this file
While files from the Internet can be useful, this file type can potentially harm your computer. Only run software from publishers you trust. What's the risk?

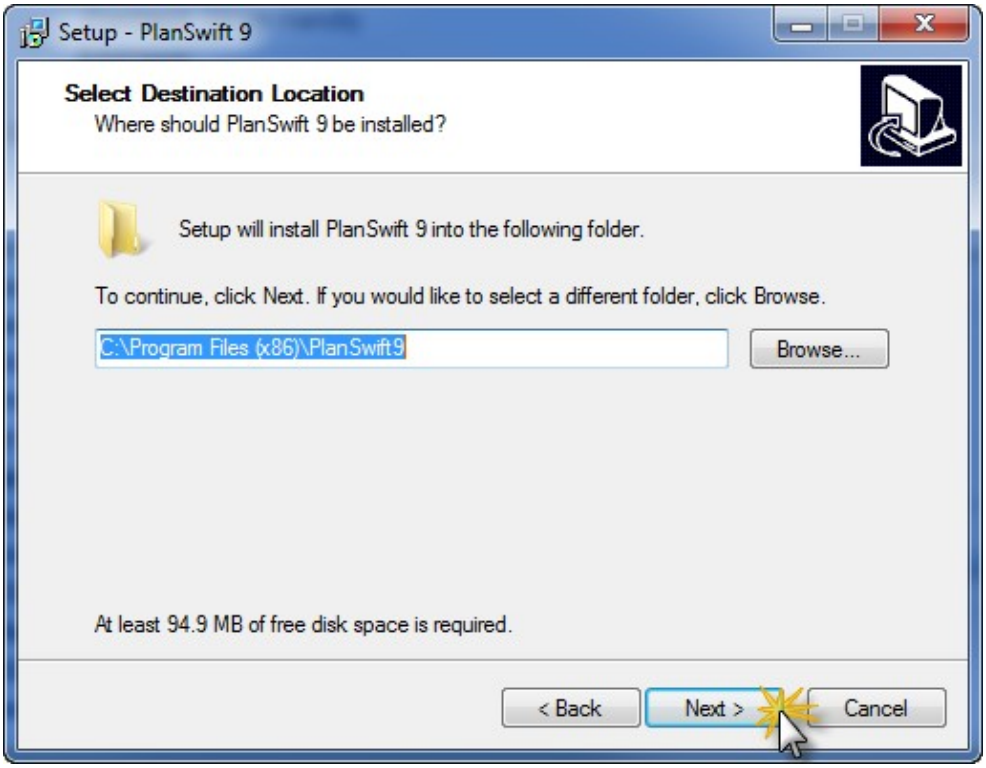
5. When the set up wizard launches click 'Next'.

Setup - PlanSwift 9
Welcome to the PlanSwift 9 Setup Wizard
This will install PlanSwift Internal 9.0 on your computer.
It is recommended that you close all other applications before continuing.
Click Next to continue, or Cancel to exit Setup.
Next >
Cancel

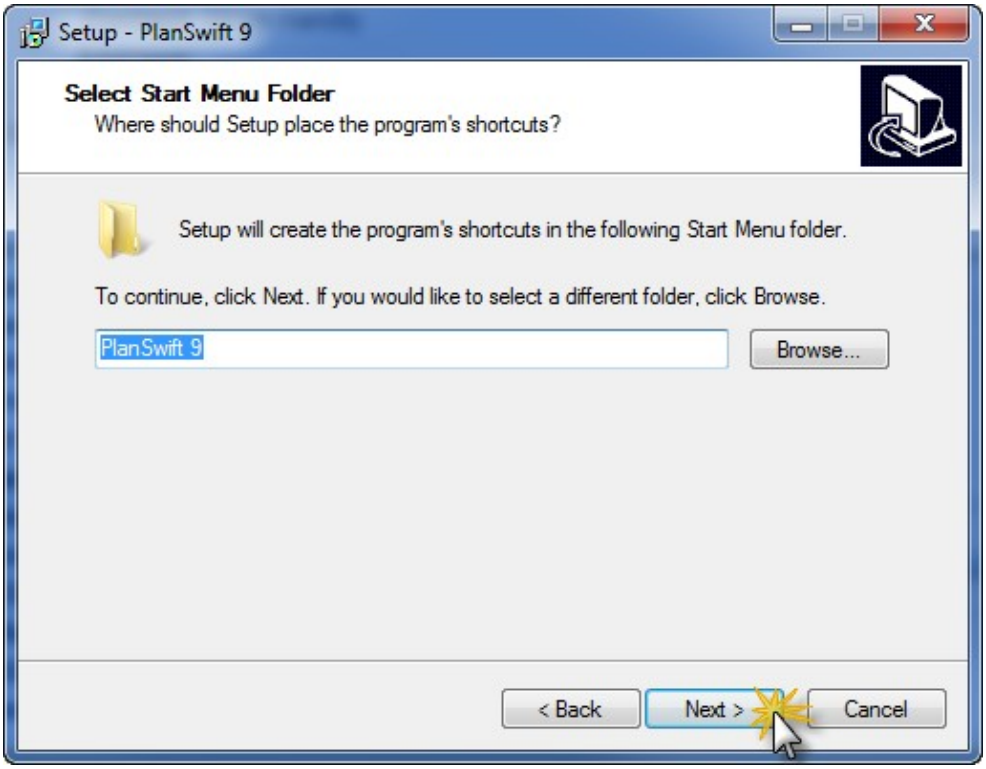
6. Accept the terms and conditions and press 'Next'.


Setup - PlanSwift 9
License Agreement
Please read the following important information before continuing.
Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.
This program is provided "as-is". No warranties of any kind whatsoever are made as to it or any medium it may be on. No remedy will be provided for indirect, consequential, punitive or incidental damages arising from it, including such from negligence, strict liability, or breach of warranty or contract, even after notice of the possibility of such damages. We make no guarantee to accuracy in data, including measurements, scaling, or any aspect of the software, though we attempt to provide it as accurately as possible.
This software is protected by copyright laws. Users only have the right to operate the software if it is properly licensed. Distribution is strictly prohibited. All concepts and functions of this software are to remain confidential. You may not disassemble,
I accept the agreement
I do not accept the agreement
< Back
Next >
Cancel

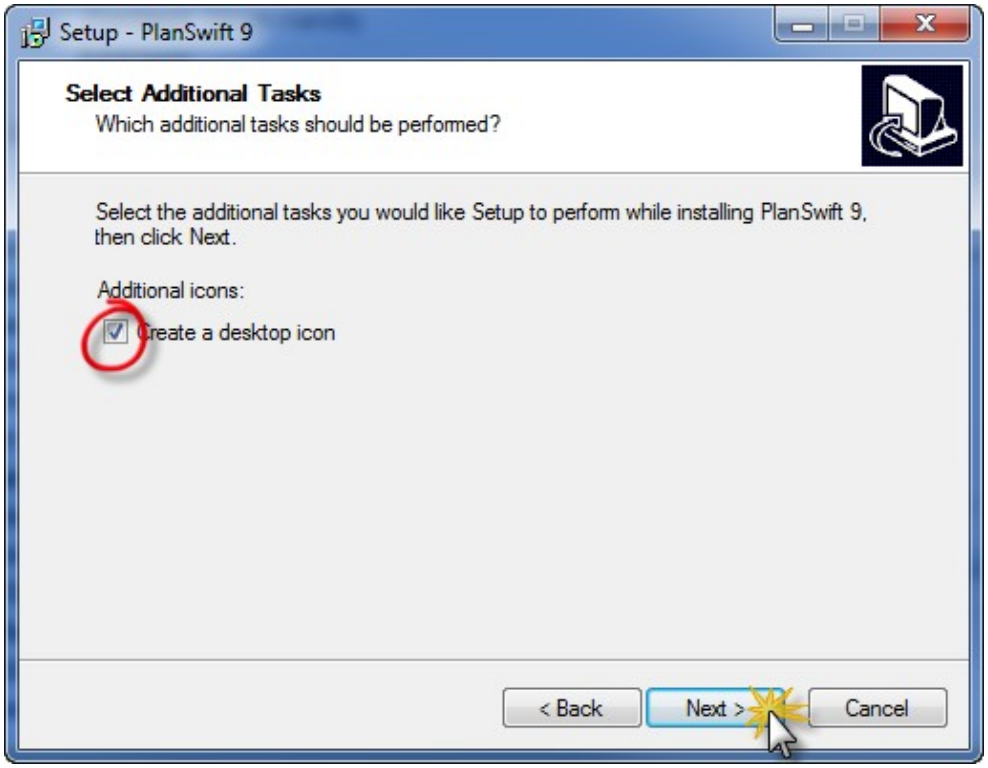
7. Either use the default installation directory **(recommended)** or select your desired directory and click 'Next'.
Note: *The installation must be on your local hard drive. You cannot install PlanSwift to a remote drive, external hard drive or thumb drive!*


Setup - PlanSwift 9
Select Destination Location
Where should PlanSwift 9 be installed?
Setup will install PlanSwift 9 into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files (x86)\PlanSwift 9
Browse...
At least 94.9 MB of free disk space is required.
< Back
Next >
Cancel

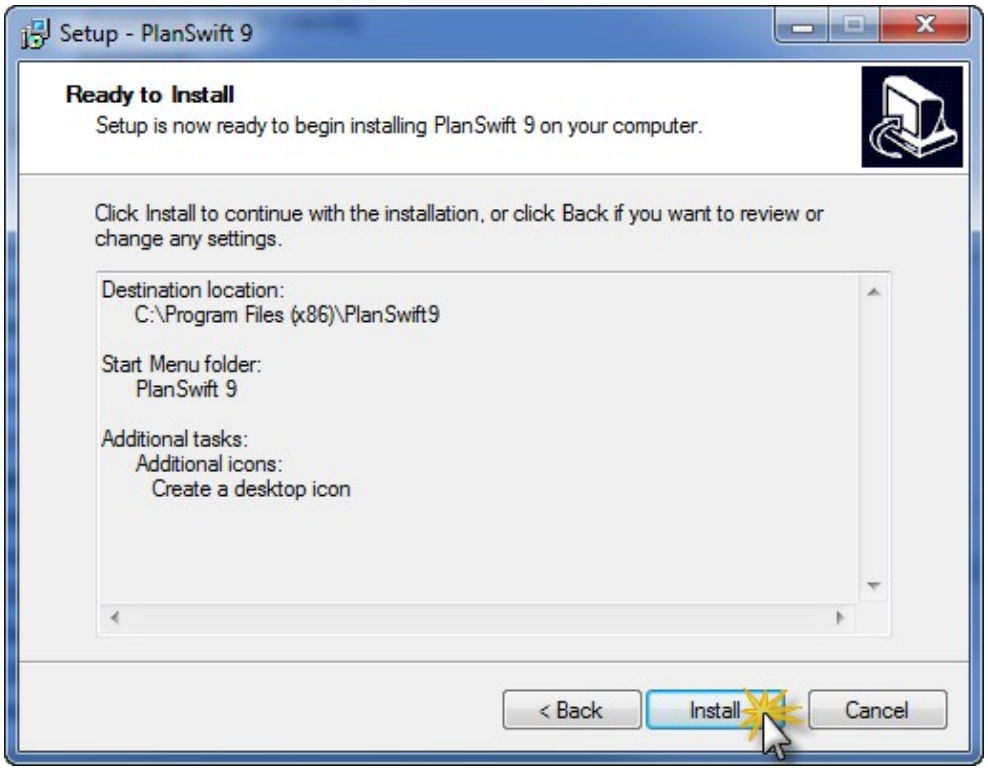
8. Select your Start Menu folder location if desired. Click 'Next'.


Setup - PlanSwift 9
Select Start Menu Folder
Where should Setup place the program's shortcuts?
Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse.
PlanSwift 9
Browse...
< Back
Next >
Cancel

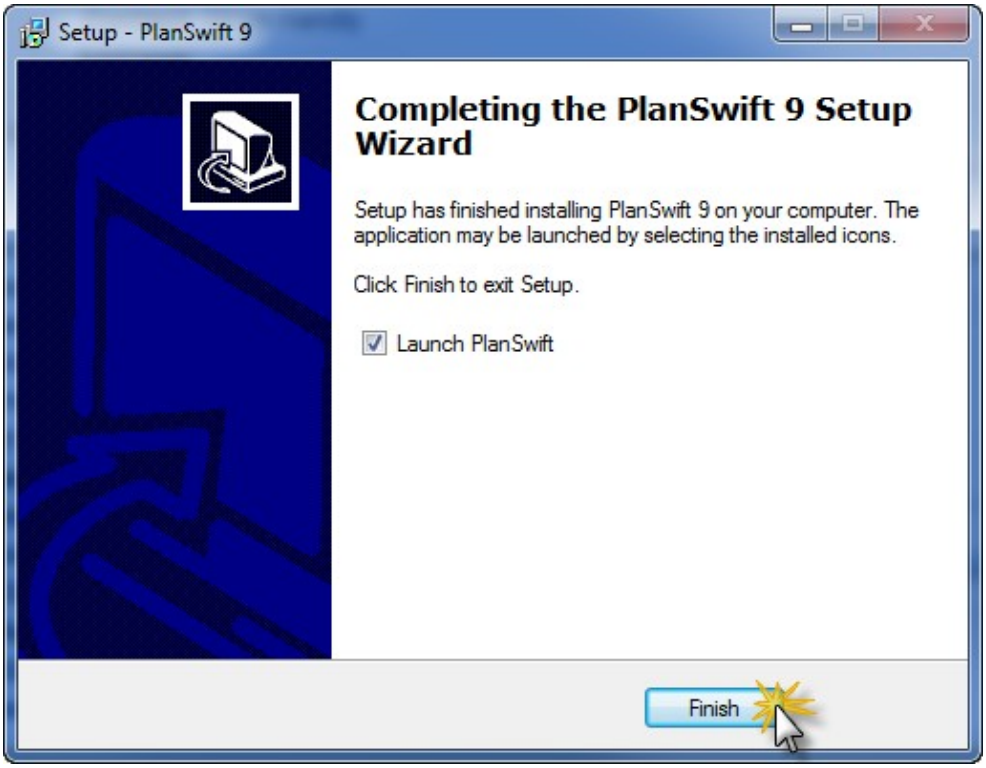
9. Select the option to place an icon on your desktop. Click 'Next'.


Setup - PlanSwift 9
Select Additional Tasks
Which additional tasks should be performed?
Select the additional tasks you would like Setup to perform while installing PlanSwift 9, then click Next.
Additional icons:
Create a desktop icon
< Back
Next >
Cancel

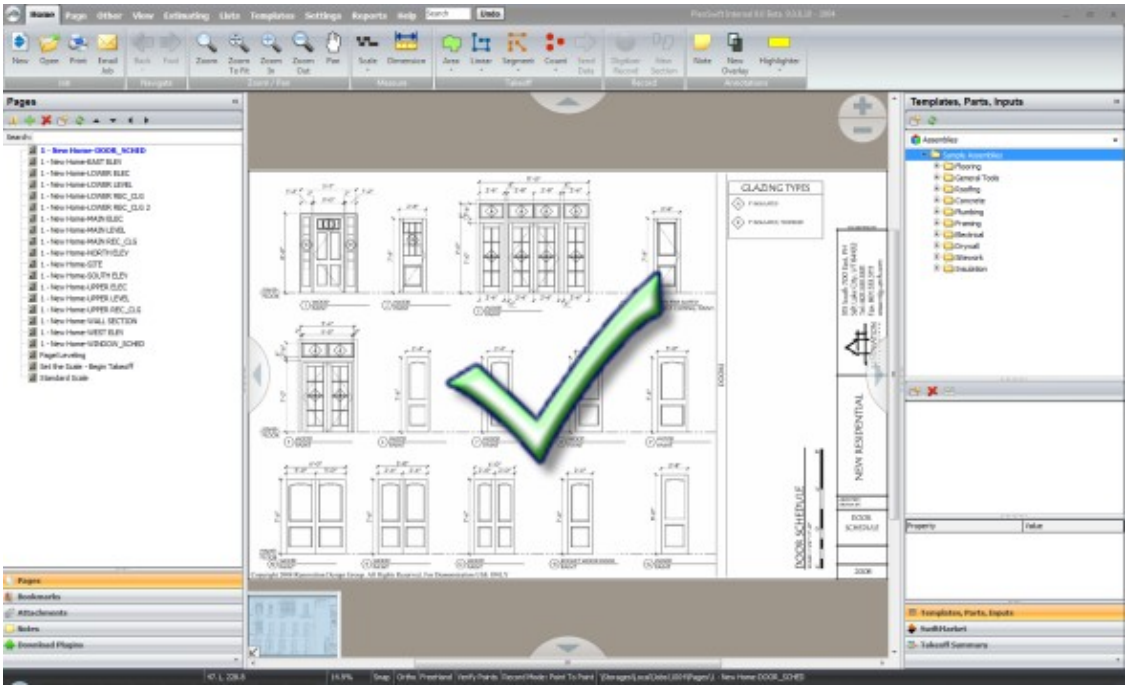
10. Review your installation options and click 'Install'. If you made a mistake simply click the 'Back' button to go back to the previous screens.


Setup - PlanSwift 9
Ready to Install
Setup is now ready to begin installing PlanSwift 9 on your computer.
Click Install to continue with the installation, or click Back if you want to review or change any settings.
Destination location:
C:\Program Files (x86)\PlanSwift9
Start Menu folder:
PlanSwift 9
Additional tasks:
Additional icons:
Create a desktop icon
< Back
Install
Cancel

11. Once the setup has finished click the Finish button to launch PlanSwift.


Setup - PlanSwift 9
Completing the PlanSwift 9 Setup Wizard
Setup has finished installing PlanSwift 9 on your computer. The application may be launched by selecting the installed icons.
Click Finish to exit Setup.
Launch PlanSwift
Finish

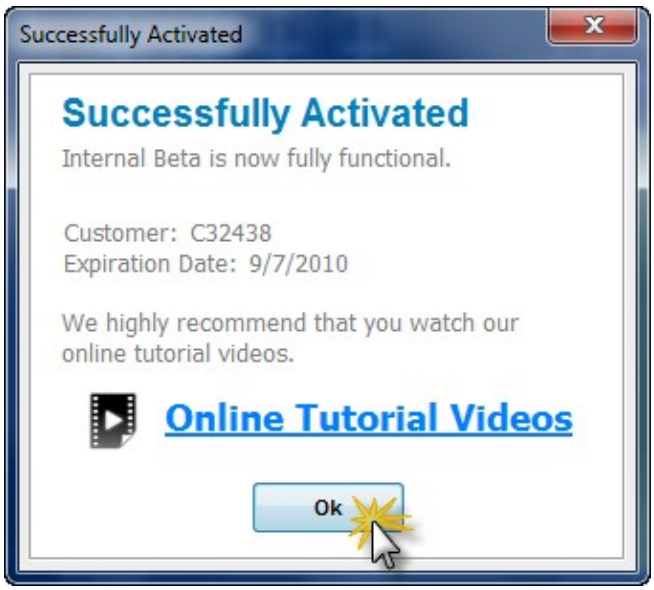
Congratulations - PlanSwift has been installed!



Unlocking PlanSwift

Once PlanSwift has been installed and run for the first time you will be prompted to activate the software. Just enter the Customer and PIN numbers you received when you received your trial or purchase.

Activate Product
Activate Product
Product: Internal Beta 9.0
Customer #: C12345
Pin #: •••••
Activate
If for any reason this form is having troubles, you can manually activate the software with an activation code.
Manual Activation


Successfully Activated
Successfully Activated
Internal Beta is now fully functional.
Customer: C32438
Expiration Date: 9/7/2010
We highly recommend that you watch our online tutorial videos.
Online Tutorial Videos
Ok

Applying Software Updates

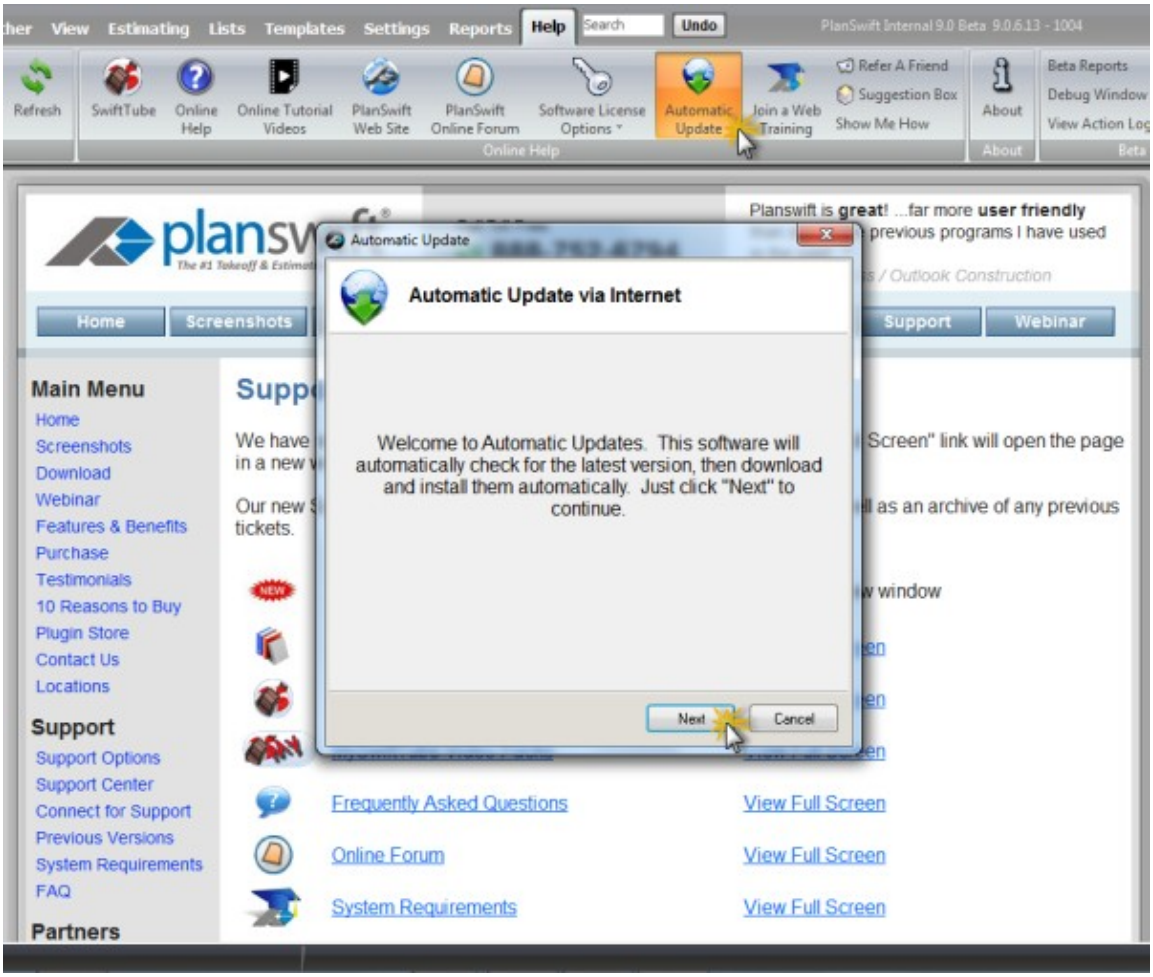
Software Updates

Applying updates to PlanSwift is simple and fast. This quick guide will show you how to do it.

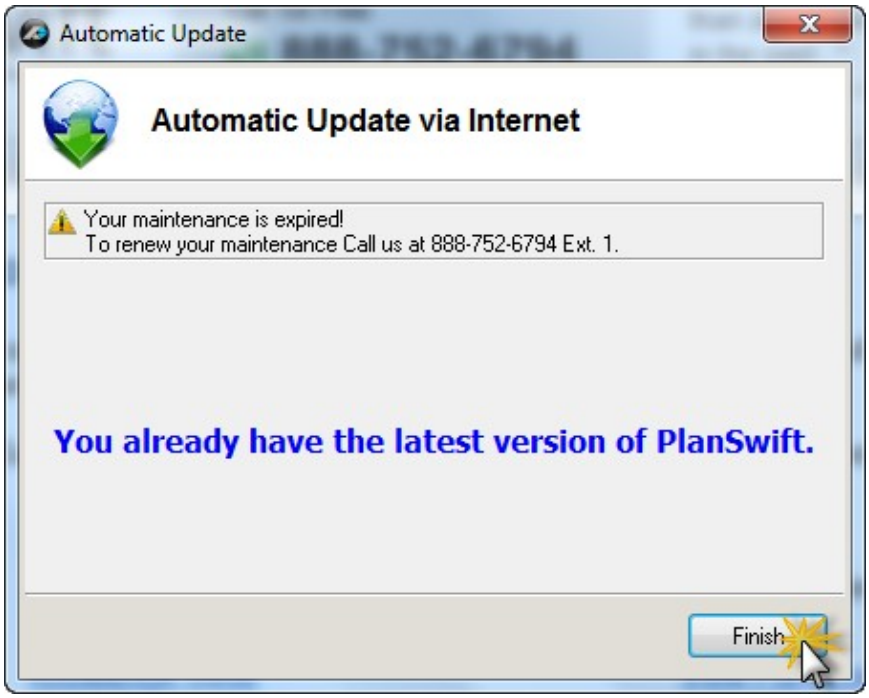
1. Select the 'Help' tab along the top of your screen.

2. Select the 'Automatic Update' button. This will cause the update screen to open.

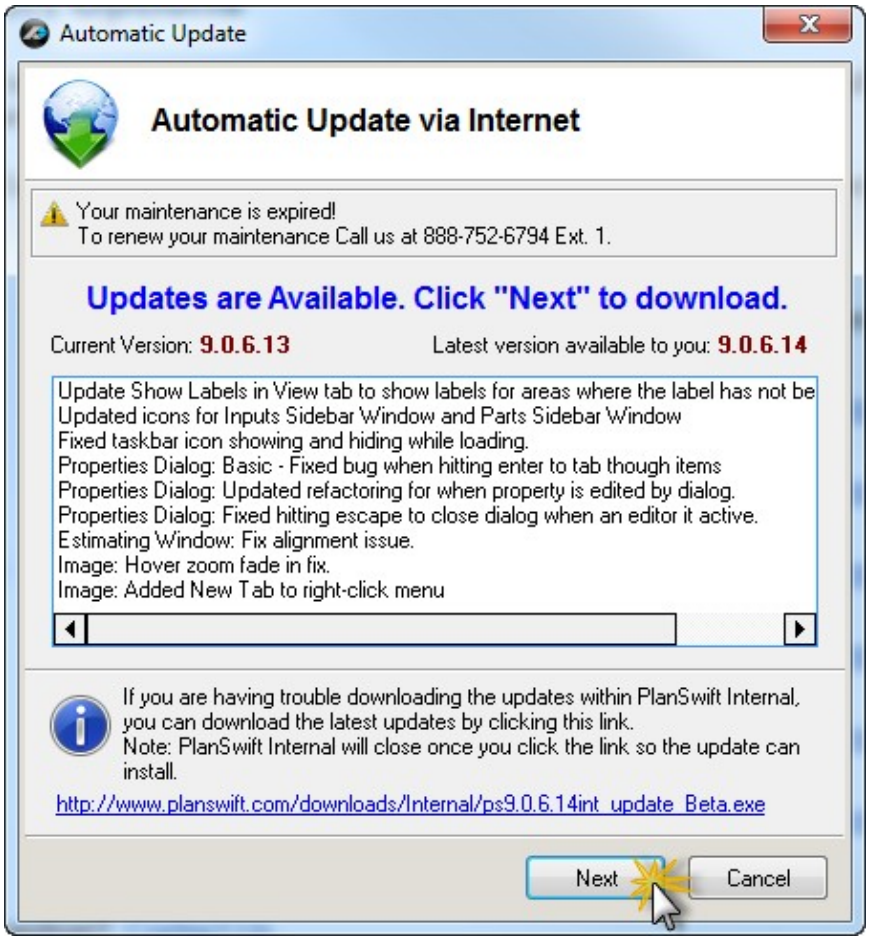
3. Select 'Next'. PlanSwift will automatically check for updates. If your copy needs updating you will asked to update. Otherwise you will be shown you have the latest copy.



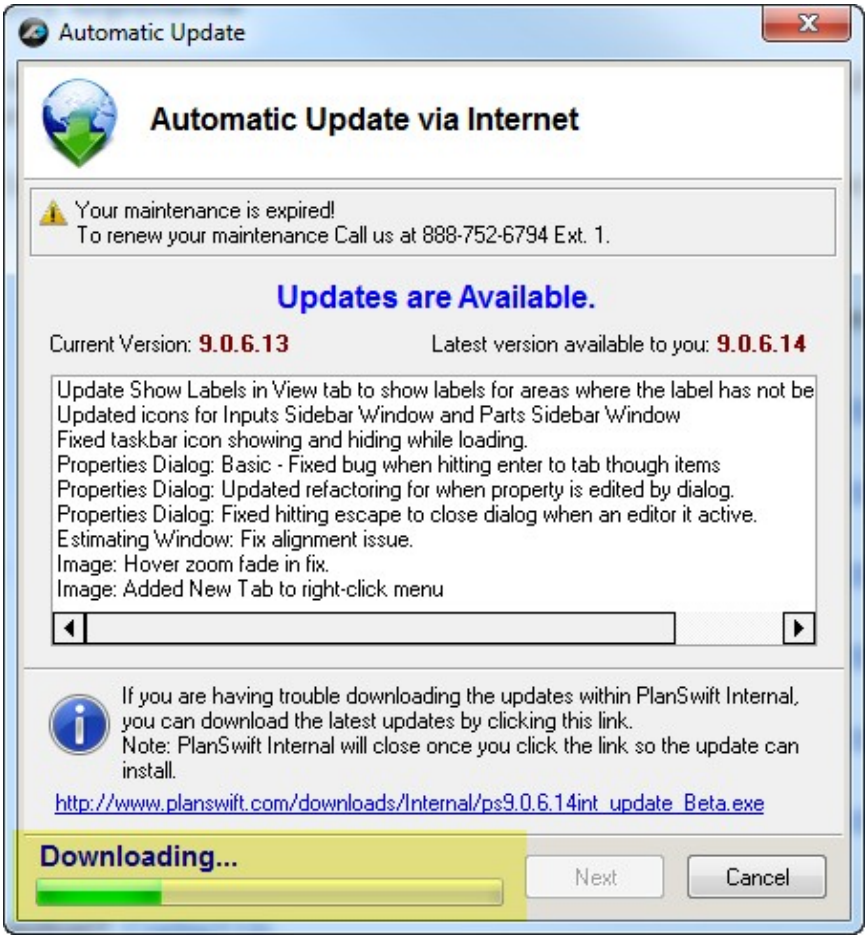
4. If you are already up to date click 'Finish' to end the updates **OR** if you need updates you will be shown what updates need installed.


Automatic Update
Automatic Update via Internet
Your maintenance is expired!
To renew your maintenance Call us at 888-752-6794 Ext. 1.
You already have the latest version of PlanSwift.
Finish

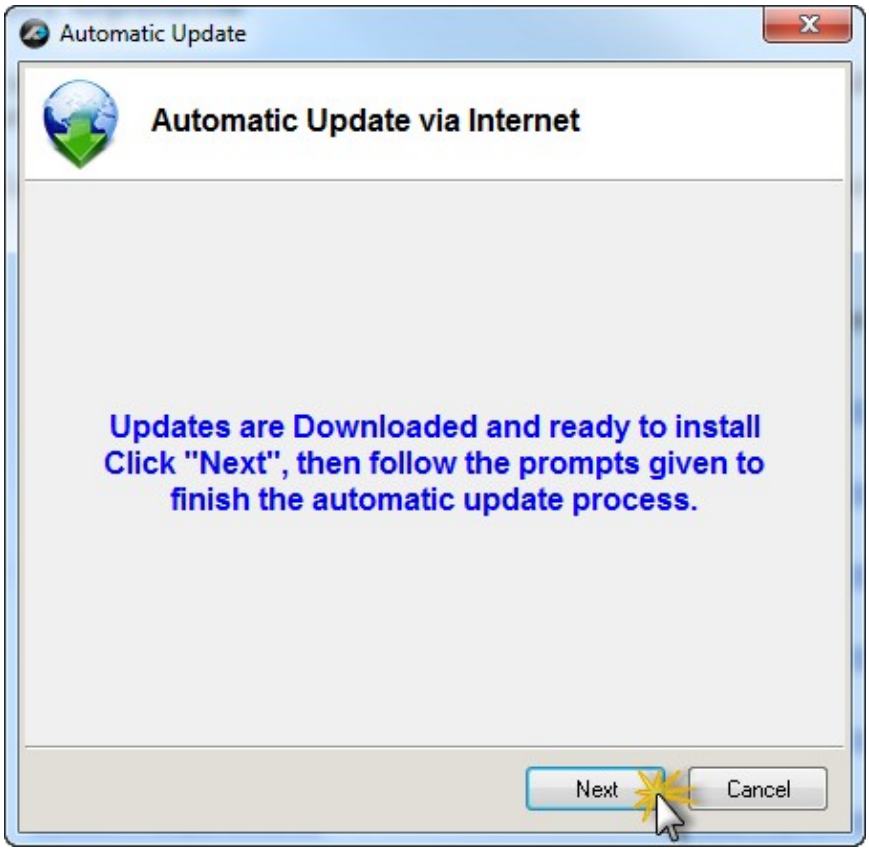
5. Click 'Next' to download updates to your computer. You can follow the progress of the updates with the download bar.


Automatic Update
Automatic Update via Internet
Your maintenance is expired!
To renew your maintenance Call us at 888-752-6794 Ext. 1.
Updates are Available. Click "Next" to download.
Current Version: 9.0.6.13
Latest version available to you: 9.0.6.14
Update Show Labels in View tab to show labels for areas where the label has not be
Updated icons for Inputs Sidebar Window and Parts Sidebar Window
Fixed taskbar icon showing and hiding while loading.
Properties Dialog: Basic - Fixed bug when hitting enter to tab though items
Properties Dialog: Updated refactoring for when property is edited by dialog.
Properties Dialog: Fixed hitting escape to close dialog when an editor it active.
Estimating Window: Fix alignment issue.
Image: Hover zoom fade in fix.
Image: Added New Tab to right-click menu
If you are having trouble downloading the updates within PlanSwift Internal, you can download the latest updates by clicking this link.
Note: PlanSwift Internal will close once you click the link so the update can install.
http://www.planswift.com/downloads/Internal/ps9.0.6.14int_update_Beta.exe
Next
Cancel

6. Click 'Next' to begin the installation process. Follow the prompts to allow the program to install the updates.


Automatic Update
Automatic Update via Internet
Your maintenance is expired!
To renew your maintenance Call us at 888-752-6794 Ext. 1.
Updates are Available.
Current Version: 9.0.6.13
Latest version available to you: 9.0.6.14
Update Show Labels in View tab to show labels for areas where the label has not be
Updated icons for Inputs Sidebar Window and Parts Sidebar Window
Fixed taskbar icon showing and hiding while loading.
Properties Dialog: Basic - Fixed bug when hitting enter to tab though items
Properties Dialog: Updated refactoring for when property is edited by dialog.
Properties Dialog: Fixed hitting escape to close dialog when an editor it active.
Estimating Window: Fix alignment issue.
Image: Hover zoom fade in fix.
Image: Added New Tab to right-click menu
If you are having trouble downloading the updates within PlanSwift Internal, you can download the latest updates by clicking this link.
Note: PlanSwift Internal will close once you click the link so the update can install.
http://www.planswift.com/downloads/Internal/ps9.0.6.14int_update_Beta.exe
Downloading...
Next
Cancel

7. PlanSwift will automatically restart with the latest updates working.


Automatic Update
Automatic Update via Internet
Updates are Downloaded and ready to install
Click "Next", then follow the prompts given to
finish the automatic update process.
Next
Cancel

To watch a video about program updating, click here.

Navigation

Navigation Buttons

The navigation buttons allow you to move backwards and forward in the Pages you are working on.

'Back'-will move you to the page previous to the current page.

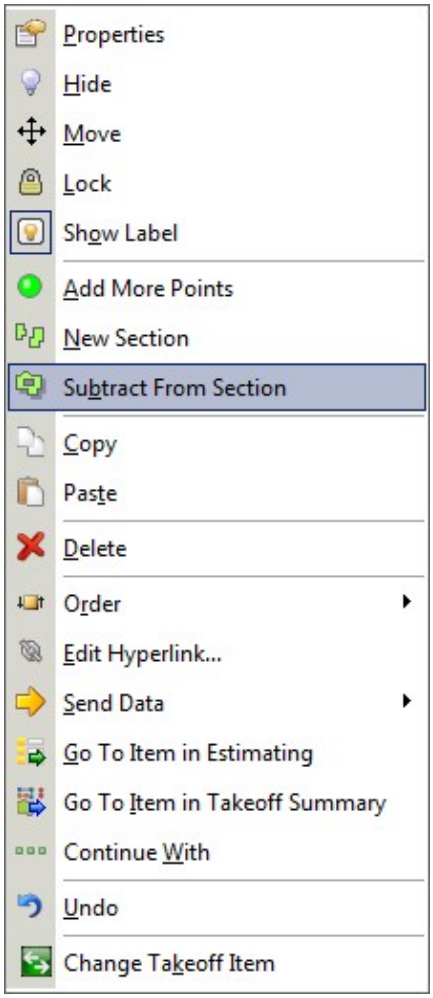
"Forward'-will move you to the next page.

The previous and next pages are not always the next in the list. PlanSwift goes by the pages you are viewing similar to how a web browser history works. The buttons will remain grayed out until you actually switch between pages. This way you do not need to skip pages you are not using.

Subtracting a Section

To subtract a section from an already existing digitized area, first select the digitized area you will be editing. Once selected, the perimeter of the digitized area should be highlighted red.

Then, right click the digitized area and select 'Subtract from Section'.

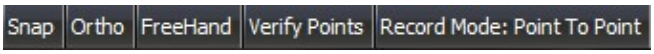


From there, continue to digitize the area you would like to remove. Please note that you must stay within the bounds of the area you are subtracting from.

To watch a video about how to subtract a section, click here.

Digital Takeoff Tool Options

The Digital Takeoff recording options are located at the bottom of your screen.



There are five different tool options. Snap, Ortho, Freehand, Verify Points, and a Record Mode. These options can be turned on or off by simply clicking on their location.

Snapping allows an object to easily be positioned in alignment with another object by causing it to automatically jump to an exact position when you drag it into the proximity of a desired location. For example, if creating a New Linear, you can snap your lines to an existing point by putting your cursor near that point.

Ortho means straight. This will keep you locked in the horizontal, vertical, and forty-five degree axis. You can temporarily override this option by holding the Shift key to allow you to move to any angle you would like.

Freehand allows the takeoff of a free form object. By holding the left click on the mouse, the lines will follow the cursor movement.

The **Verify Points** option allows you to modify the exact length of the segment you are taking off, on the fly. When you click each point after setting this tool, you will be prompted with a dialog box in which you can adjust the dimension.

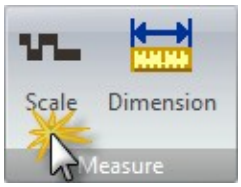
Record Mode has two options, **Point to Point**, and **Box**. Toggle between these options by clicking the on the **Record Mode** text. *Note: This is only visible when you have a digitizer tool active.*

- **Point to Point** sets a point each time you click your mouse while actively recording in a takeoff tool.
- **Box** is a two click drawing mode which allows you to create rectangle or square areas by clicking two opposite corners such as upper left and lower right.

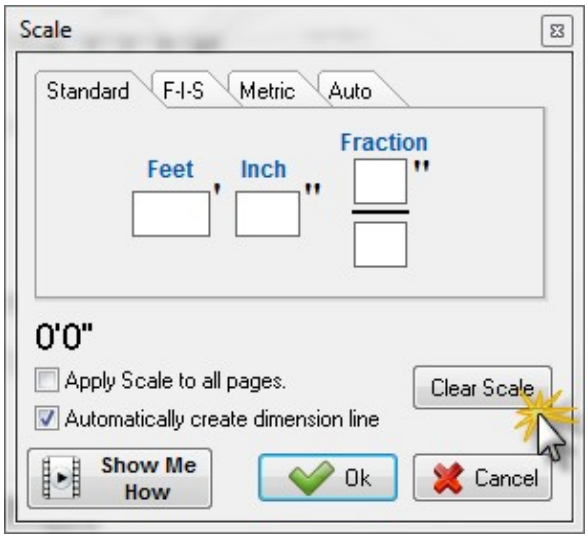
To watch a video about the Digital Takeoff Tool Options, click here.

How To Remove a Scale

To remove a scale from a page, first make sure to select that desired page. Once you have the page selected, click on the 'Scale' button in the 'Home' tab.



Simply click the 'Clear Scale' button, and the scale will be removed from that page.



To watch a video on how to remove a scale, click here.

Parts & Assemblies

Excel Integration

Reports

License Management

Importing Plans

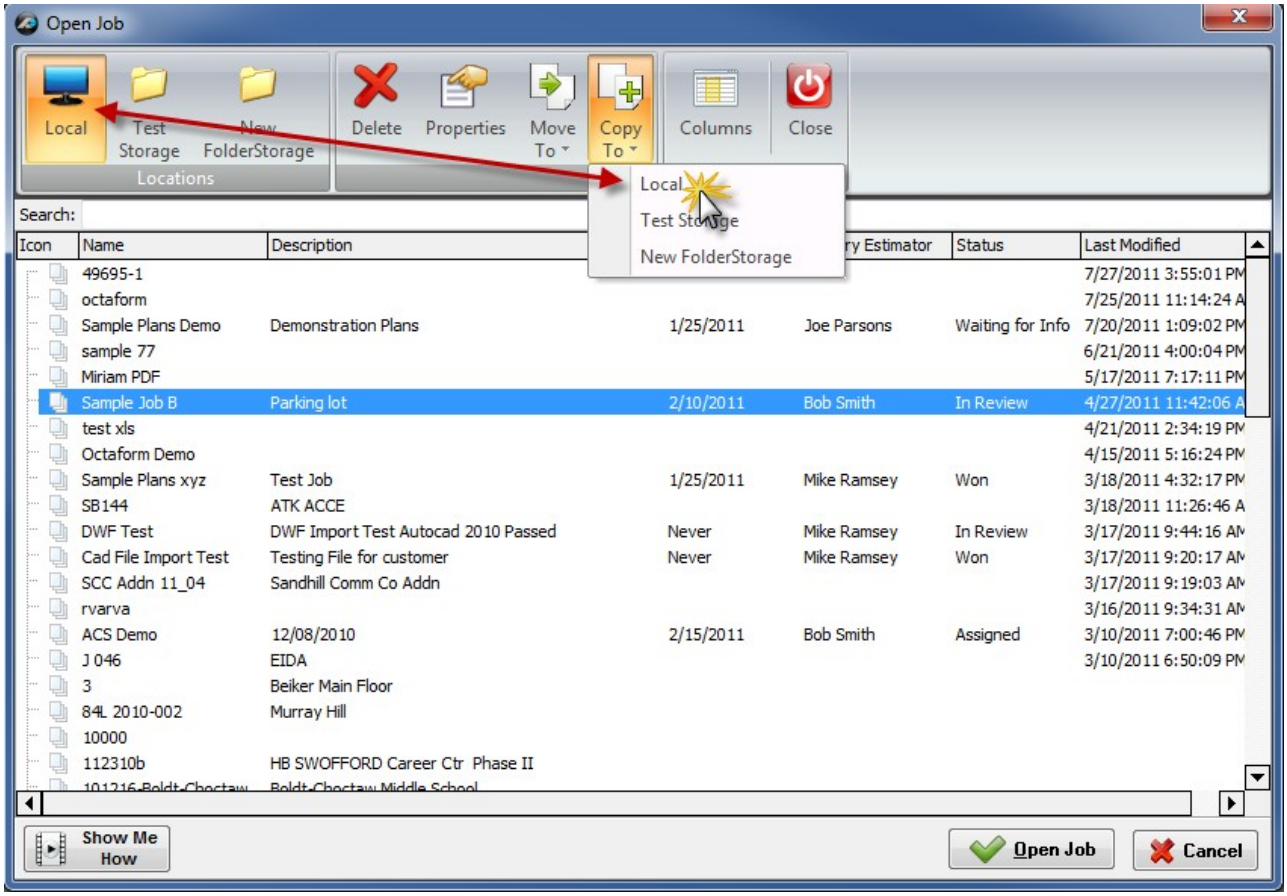
This Section offers several tutorials on how to import plans into PlanSwift

Job Management

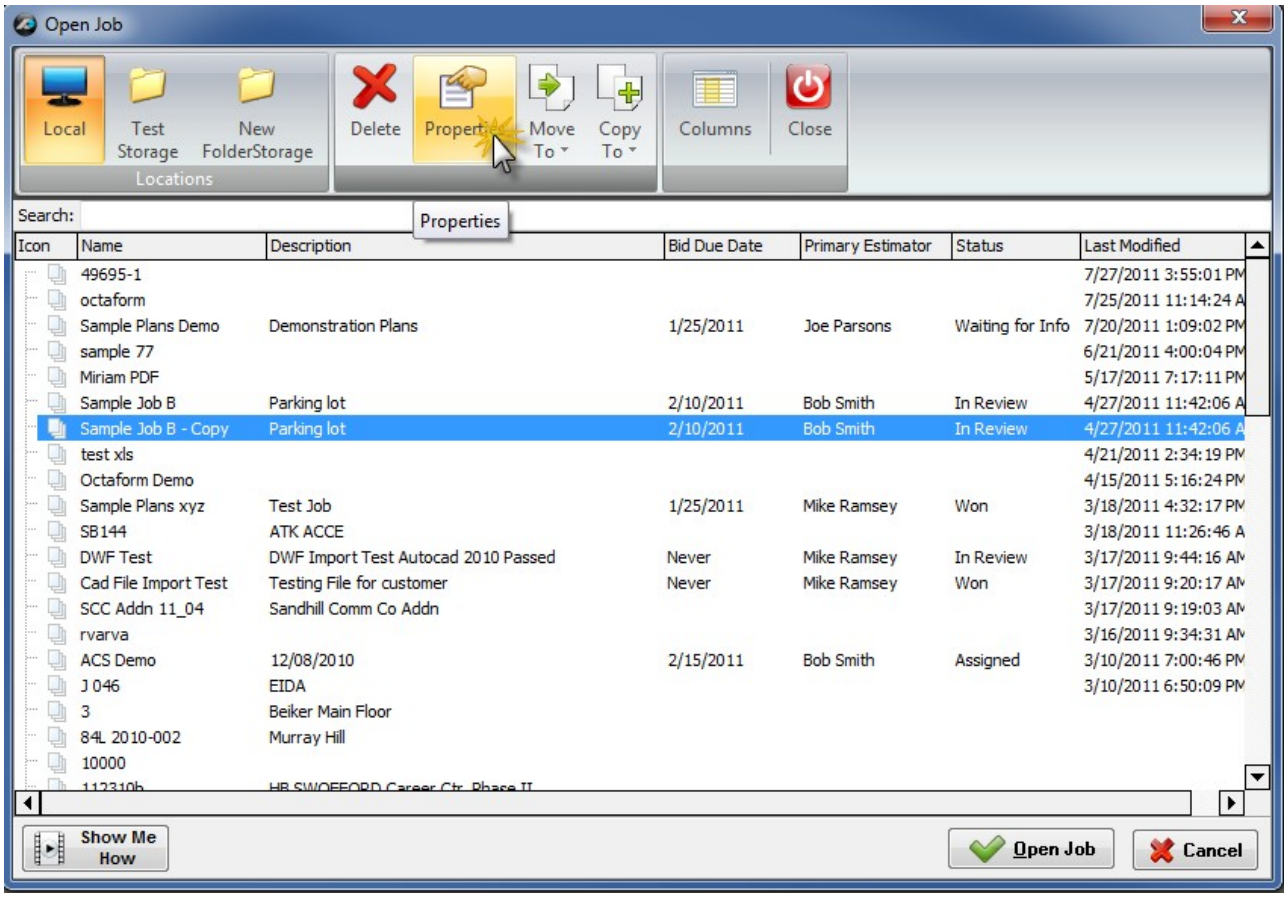
How to copy a job

If you would like to make a copy of an existing PlanSwift job just follow these steps.

1. Go to the Open button on the home tab and open the job list.
2. Select the project from the list that you want to copy.
3. Select the 'Copy To' button and click the storage you wish to copy the project to. Select the same storage location if you want the copy in the same location as the original.


Open Job
Local
Test Storage
New FolderStorage
Locations
Delete
Properties
Move To
Copy To
Columns
Close
Local
Test Storage
New FolderStorage
Search:
Icon
Name
Description
Status
Last Modified
49695-1 7/27/2011 3:55:01 PM
octaform 7/25/2011 11:14:24 A
Sample Plans Demo Demonstration Plans 1/25/2011 Joe Parsons Waiting for Info 7/20/2011 1:09:02 PM
sample 77 6/21/2011 4:00:04 PM
Miriam PDF 5/17/2011 7:17:11 PM
Sample Job B Parking lot 2/10/2011 Bob Smith In Review 4/27/2011 11:42:06 A
test xls 4/21/2011 2:34:19 PM
Octaform Demo 4/15/2011 5:16:24 PM
Sample Plans xyz Test Job 1/25/2011 Mike Ramsey Won 3/18/2011 4:32:17 PM
SB144 ATK ACCE 3/18/2011 11:26:46 A
DWF Test DWF Import Test Autocad 2010 Passed Never Mike Ramsey In Review 3/17/2011 9:44:16 AM
Cad File Import Test Testing File for customer Never Mike Ramsey Won 3/17/2011 9:20:17 AM
SCC Addn 11_04 Sandhill Comm Co Addn 3/17/2011 9:19:03 AM
rvarva 3/16/2011 9:34:31 AM
ACS Demo 12/08/2010 2/15/2011 Bob Smith Assigned 3/10/2011 7:00:46 PM
J 046 EIDA 3/10/2011 6:50:09 PM
3 Beiker Main Floor
84L 2010-002 Murray Hill
10000
112310b HB SWOFFORD Career Ctr Phase II
Show Me How
Open Job
Cancel

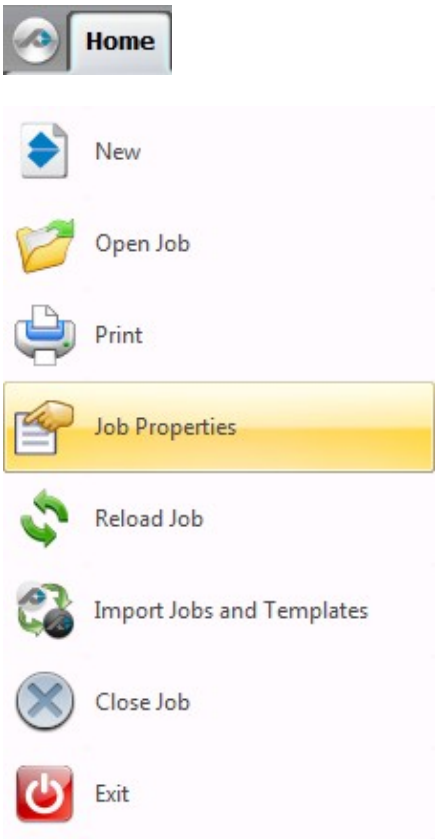
4. Once the job has processed the copy simply select the copy and press the Properties button on the tool bar.


Open Job
Local
Test Storage
New FolderStorage
Locations
Delete
Properties
Move To
Copy To
Columns
Close
Search:
Properties
Icon
Name
Description
Bid Due Date
Primary Estimator
Status
Last Modified
49695-1 7/27/2011 3:55:01 PM
octaform 7/25/2011 11:14:24 A
Sample Plans Demo Demonstration Plans 1/25/2011 Joe Parsons Waiting for Info 7/20/2011 1:09:02 PM
sample 77 6/21/2011 4:00:04 PM
Miriam PDF 5/17/2011 7:17:11 PM
Sample Job B Parking lot 2/10/2011 Bob Smith In Review 4/27/2011 11:42:06 A
Sample Job B - Copy Parking lot 2/10/2011 Bob Smith In Review 4/27/2011 11:42:06 A
test xls 4/21/2011 2:34:19 PM
Octaform Demo 4/15/2011 5:16:24 PM
Sample Plans xyz Test Job 1/25/2011 Mike Ramsey Won 3/18/2011 4:32:17 PM
SB144 ATK ACCE 3/18/2011 11:26:46 A
DWF Test DWF Import Test Autocad 2010 Passed Never Mike Ramsey In Review 3/17/2011 9:44:16 AM
Cad File Import Test Testing File for customer Never Mike Ramsey Won 3/17/2011 9:20:17 AM
SCC Addn 11_04 Sandhill Comm Co Addn 3/17/2011 9:19:03 AM
rvarva 3/16/2011 9:34:31 AM
ACS Demo 12/08/2010 2/15/2011 Bob Smith Assigned 3/10/2011 7:00:46 PM
J 046 EIDA 3/10/2011 6:50:09 PM
3 Beiker Main Floor
84L 2010-002 Murray Hill
10000
Show Me How
Open Job
Cancel

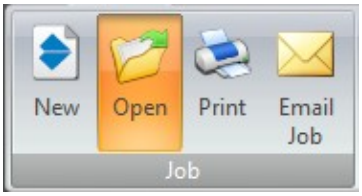
5. The Job Properties window will open. Now you can edit the job properties by clicking the advanced button on the window and change the job name if you like.

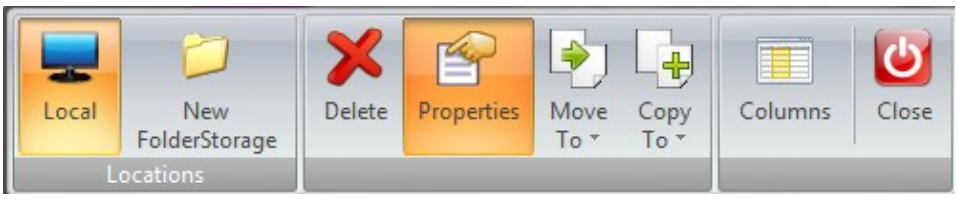
How to Rename a Job

To rename a job in PlanSwift, you need to locate the job properties window. This window is accessible by two possible ways. The first way to open this window is to click on the PlanSwift Icon in the upper right corner of the screen. This will open a drop menu where you will see the option 'Job Properties'.

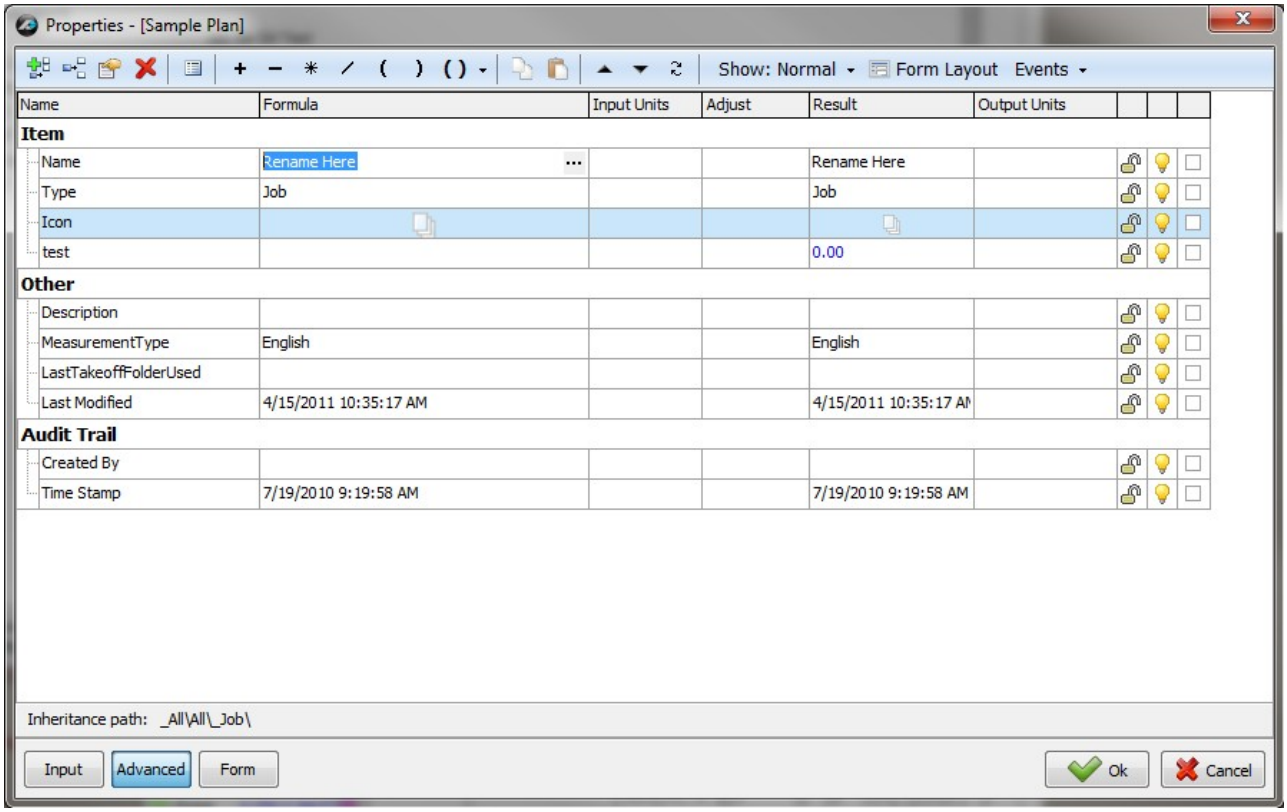


Another way to access the 'Job Properties' window is by clicking the Open Job button located in the Home tab. Again, in the Open Job window, you will see the option 'Job Properties'.





Once you open the 'Job Properties' window, edit the name of the job in the Advanced View.

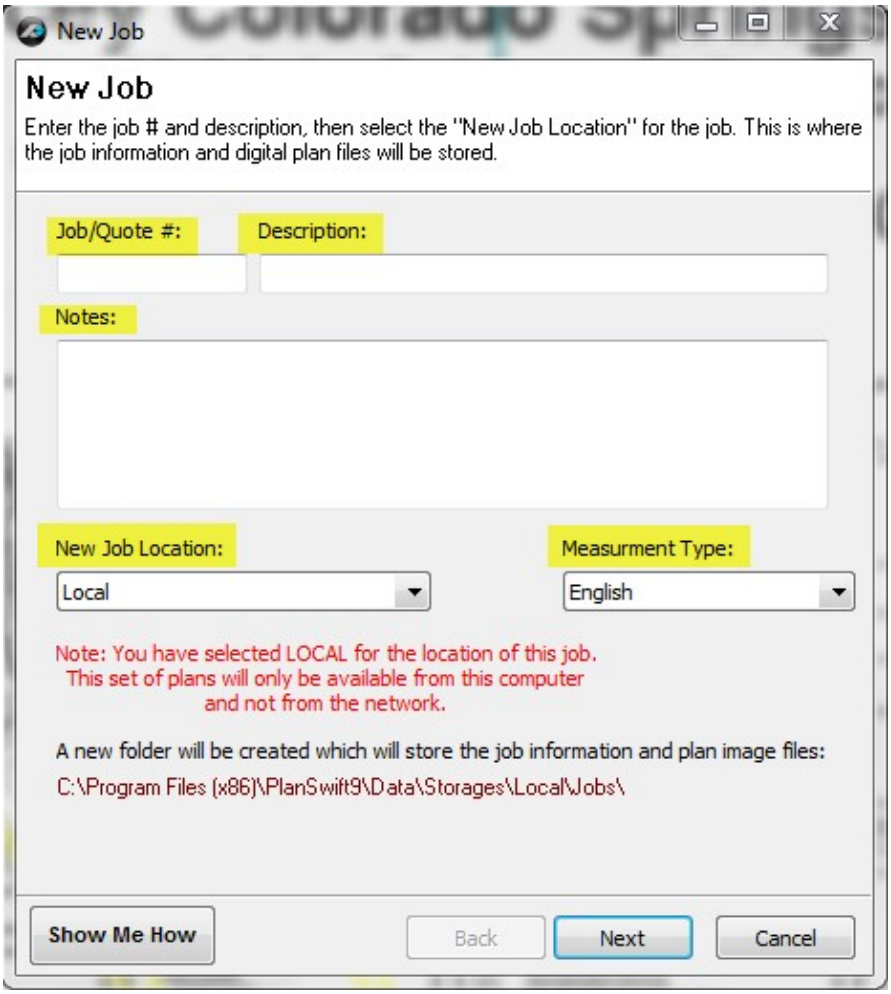


Once finished, simply click 'Ok'.

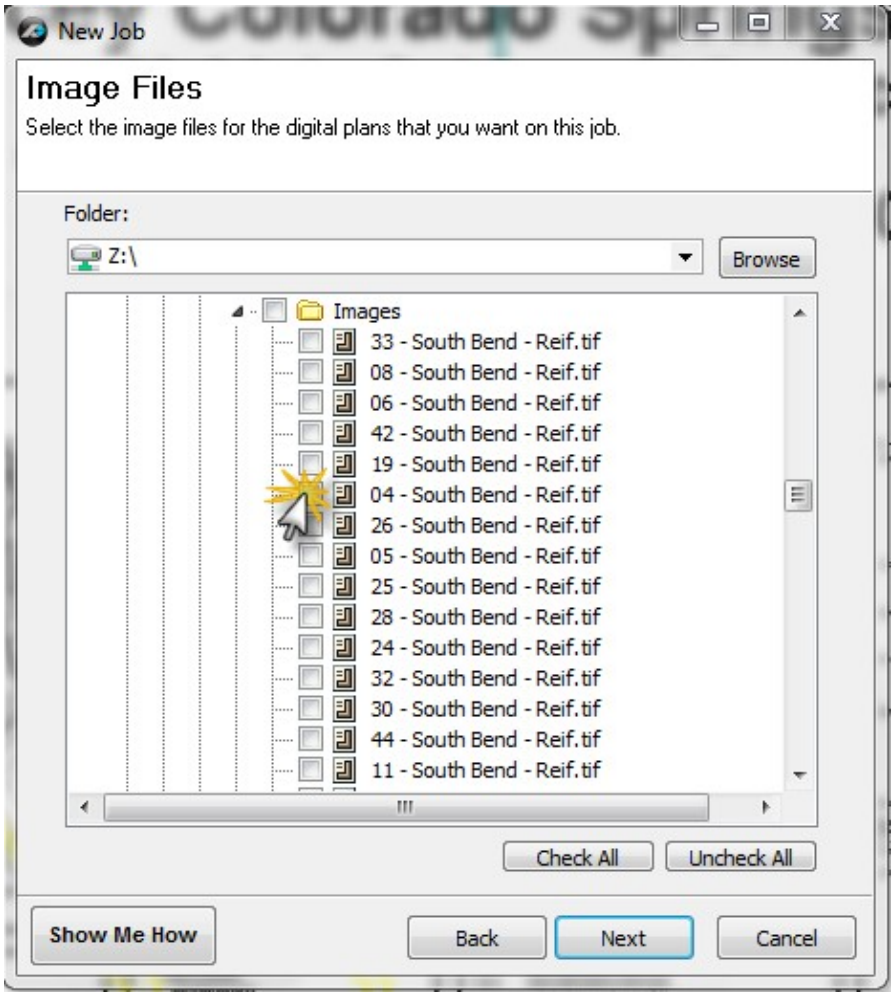
How To Start a New Project

To create a New Project , star by clicking the 'New Job' icon in the 'Home' tab.

In the 'New Job' dialog, you can edit the Job number, description of the job, any notes about the job, the location where the job will be saved, and the measurement type (English or Metric).


New Job
New Job
Enter the job # and description, then select the "New Job Location" for the job. This is where the job information and digital plan files will be stored.
Job/Quote #:
Description:
Notes:
New Job Location:
Local
Measurment Type:
English
Note: You have selected LOCAL for the location of this job.
This set of plans will only be available from this computer
and not from the network.
A new folder will be created which will store the job information and plan image files:
C:\Program Files (x86)\PlanSwift9\Data\Storages\Local\Jobs\
Show Me How
Back
Next
Cancel

Click 'Next' once you are finished. Now you will select the image files you want for the job.


New Job
Image Files
Select the image files for the digital plans that you want on this job.
Folder:
Z:\
Browse
Images
33 - South Bend - Reif.tif
08 - South Bend - Reif.tif
06 - South Bend - Reif.tif
42 - South Bend - Reif.tif
19 - South Bend - Reif.tif
04 - South Bend - Reif.tif
26 - South Bend - Reif.tif
05 - South Bend - Reif.tif
25 - South Bend - Reif.tif
28 - South Bend - Reif.tif
24 - South Bend - Reif.tif
32 - South Bend - Reif.tif
30 - South Bend - Reif.tif
44 - South Bend - Reif.tif
11 - South Bend - Reif.tif
Check All
Uncheck All
Show Me How
Back
Next
Cancel

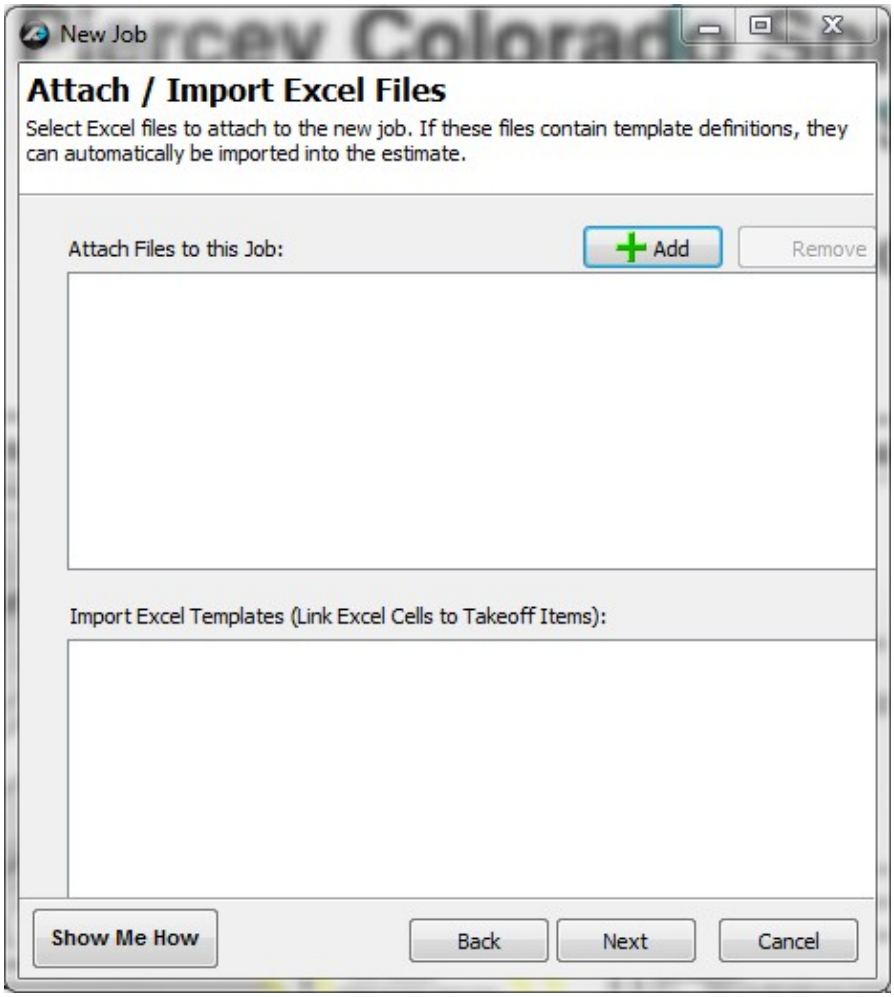
Once you locate the image files, select which ones you would like by clicking in the empty check boxes, then click "Next'.

The next window will give you options for converting PDF files and other formats. Also, for an organizational purpose for jobs with more than one page, you have the option of separating TIF files into individual files. This can be helpful if you are looking to delete just one page. If your computer runs a little slow, you may want to downsize the TIF files so your computer will run smoother and more quickly. And finally, you have the option for Page Naming which allows you to impend text to the page name.

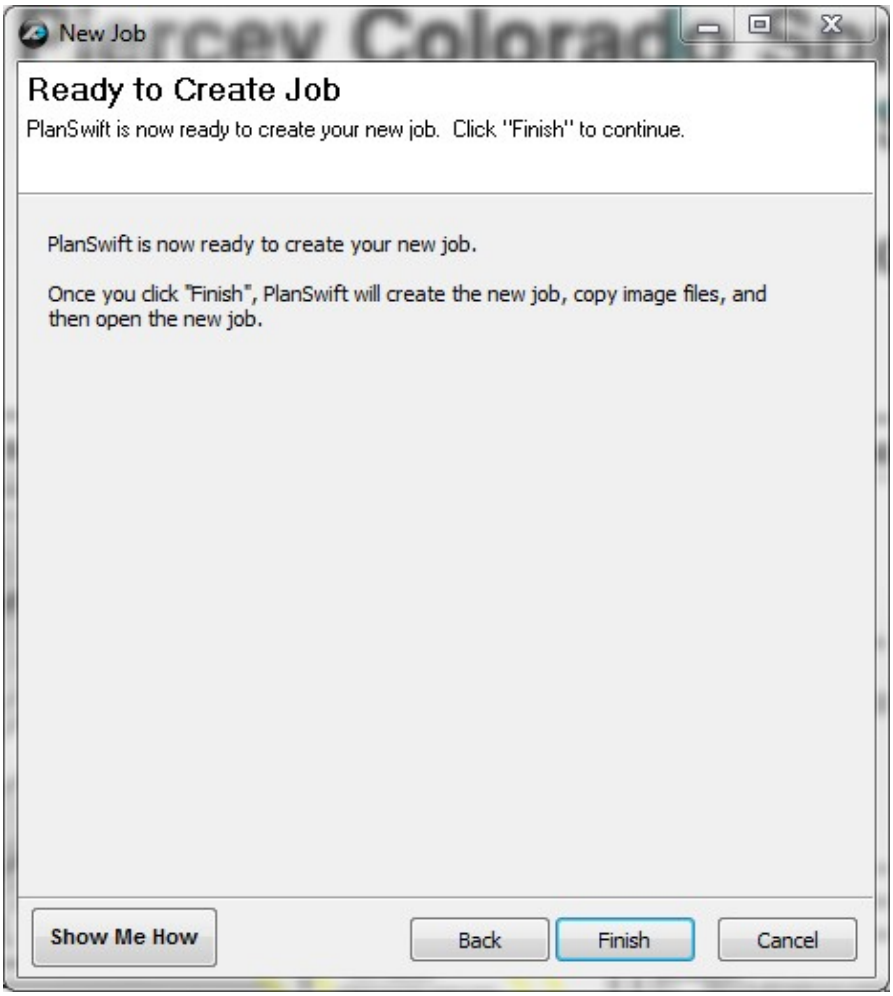
New Job
Convert Settings
Select the settings for converting image files to be used by PlanSwift.
PDF
Convert PDF files to TIF
DPI for TIF Files:
200
Format:
Grayscale (16 shades)
*note: Although PlanSwift will load PDF files, you may want to convert them to TIF for better performance.
Other Formats
Convert CPC files to TIF
Convert CAL files to TIF
Convert DJVU files to TIF
*note: PlanSwift will not be able to load these formats if they are not converted.
Multi-Page TIF
Split multi-page TIF files into separate files.
Large TIF files
Downsize large TIF files.
Page Naming
Use Page Name Default
Formula
[Title][-][Pg#]
Show Me How
Back
Next
Cancel

***(The files used in this example were already TIF files, therefore no options for conversions are available.)**

The next window allows you to import Excel files and attach other files to the job. For detailed information about this option, watch the video here.


New Job
Attach / Import Excel Files
Select Excel files to attach to the new job. If these files contain template definitions, they can automatically be imported into the estimate.
Attach Files to this Job:
Add
Remove
Import Excel Templates (Link Excel Cells to Takeoff Items):
Show Me How
Back
Next
Cancel

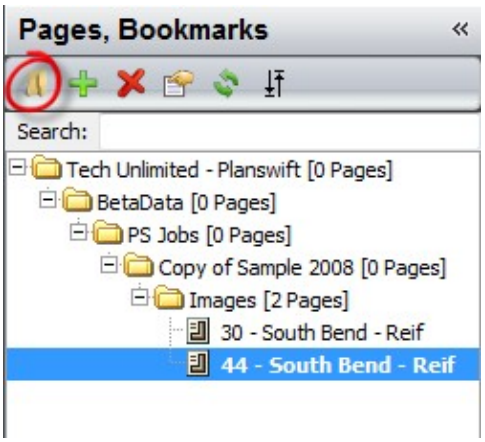
Click 'Next' to continue.

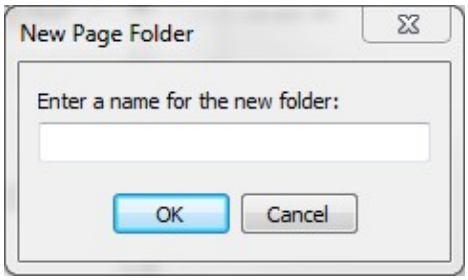

New Job
Ready to Create Job
PlanSwift is now ready to create your new job. Click "Finish" to continue.
PlanSwift is now ready to create your new job.
Once you click "Finish", PlanSwift will create the new job, copy image files, and then open the new job.
Show Me How
Back
Finish
Cancel

Now click 'Finish' to load the new job.

Now that all of your pages have loaded for your new job, you may want to organize them into multiple folders. To do this, start by creating a new folder in the Pages window on the left side of your screen.

Click on the 'New Folder' button to create a folder with the name of your choosing. Then simply drag and drop the desired pages into that folder.

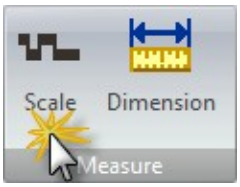

Pages, Bookmarks
Search:
Tech Unlimited - Planswift [0 Pages]
BetaData [0 Pages]
PS Jobs [0 Pages]
Copy of Sample 2008 [0 Pages]
Images [2 Pages]
30 - South Bend - Reif
44 - South Bend - Reif



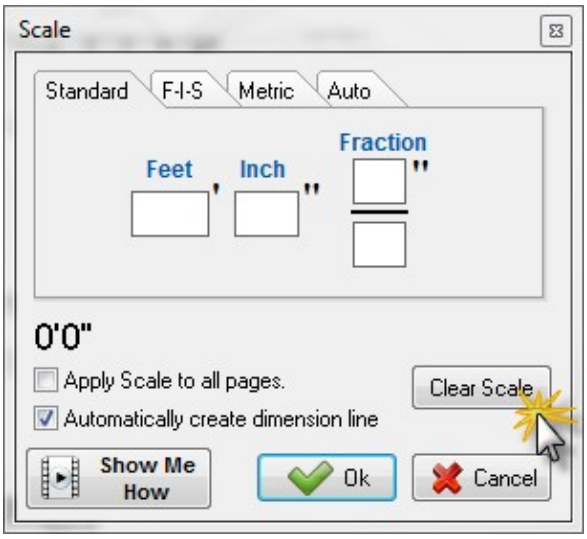
To watch a video about starting a new project, click here.

How To Remove a Scale

To remove a scale from a page, first make sure to select that desired page. Once you have the page selected, click on the 'Scale' button in the 'Home' tab.



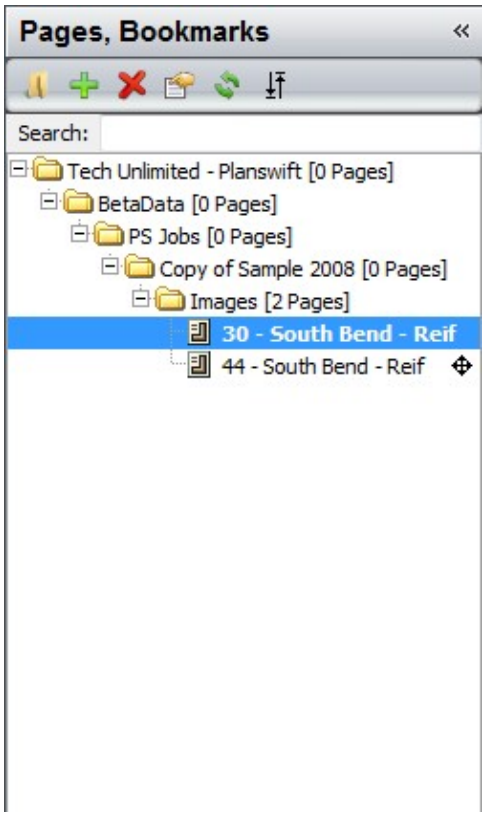
Simply click the 'Clear Scale' button, and the scale will be removed from that page.

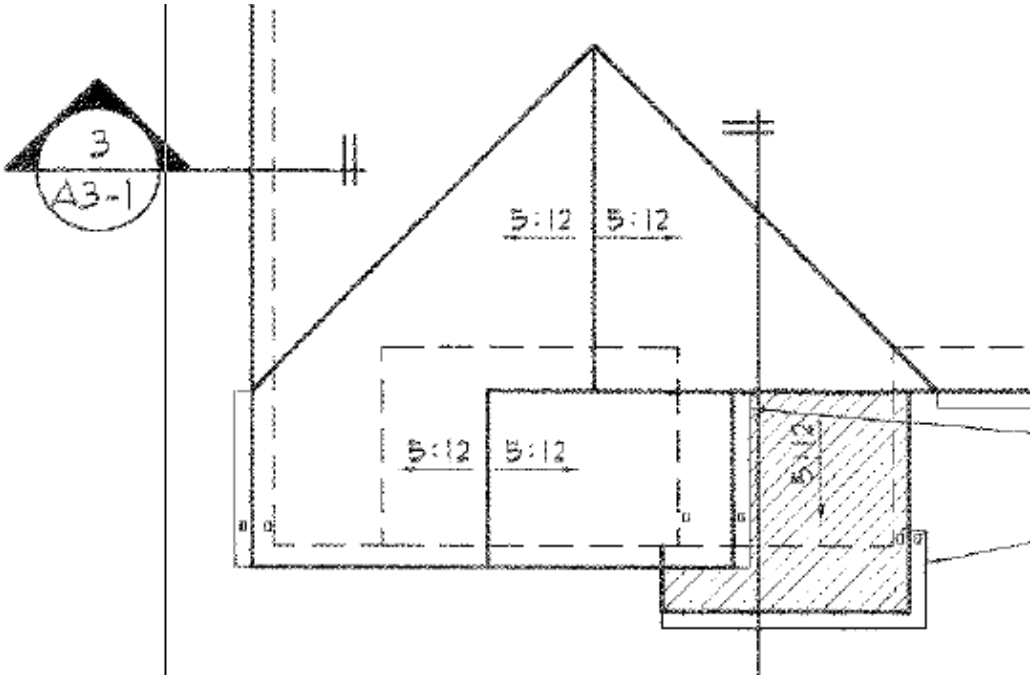


To watch a video on how to remove a scale, click here.

Adding a Bookmark

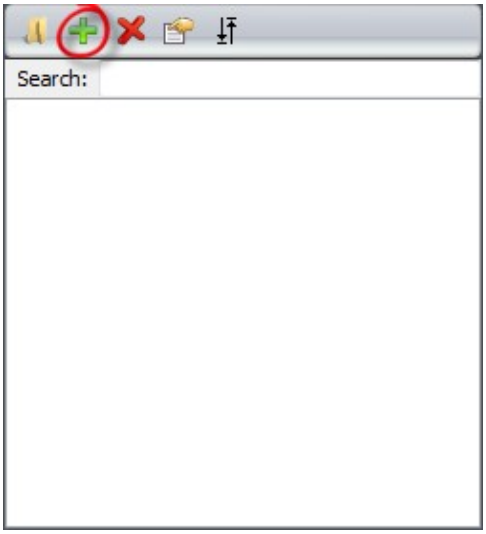
To add a bookmark, first select the page you would like to bookmark from, then select the level that you would like to create the bookmark at.

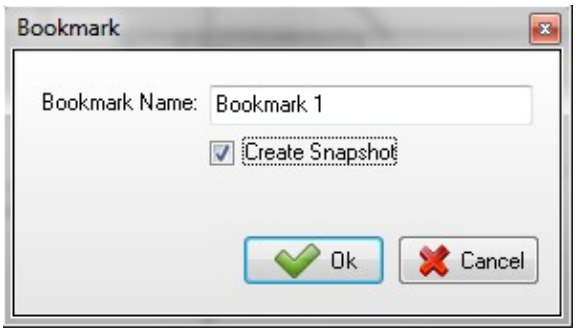

Pages, Bookmarks
Search:
Tech Unlimited - Planswift [0 Pages]
BetaData [0 Pages]
PS Jobs [0 Pages]
Copy of Sample 2008 [0 Pages]
Images [2 Pages]
30 - South Bend - Reif
44 - South Bend - Reif



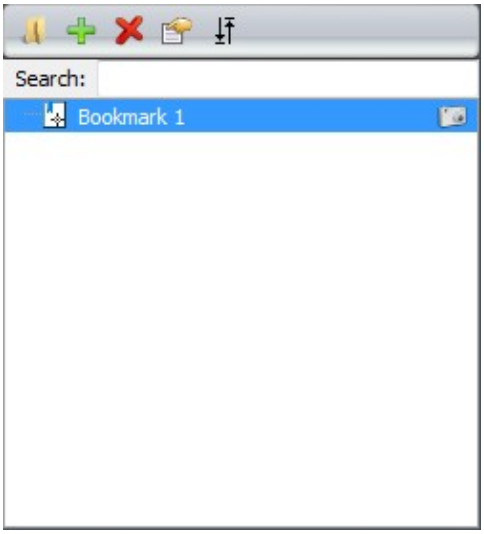
***** The level refers to the view of the image in terms of the % zoom. This example view is at approximately 70% zoom.***

Next, click the green 'plus' symbol in the Bookmark window.





Enter a name for the Bookmark, check the box for 'Create Snapshot' if you want to capture a small image of the bookmarked area, then click 'Ok'. To view the snapshot of the bookmark, click in the camera icon to the right of the bookmark name.



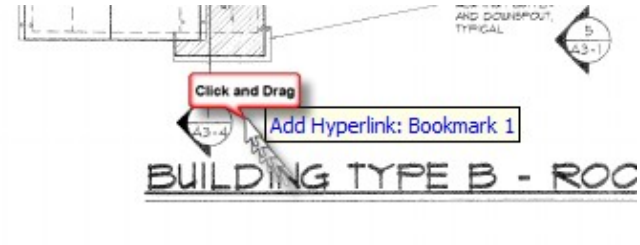
Now there is a created bookmark in the Bookmark window. Anytime a page is open, clicking the desired bookmark in the list will automatically change the page to view that specific bookmark.

To watch the video on this topic, click here.

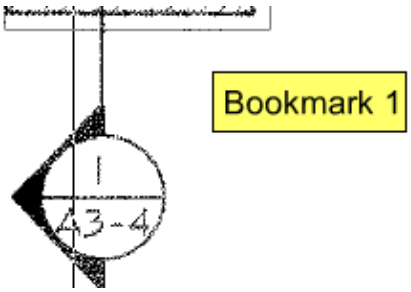
How To Add a Bookmark Link

To add a Bookmark Link, start by finding the desired bookmark in the bookmark list.

Once you have found the bookmark you want, left click on the bookmark and drag it to a desired location on the job page.



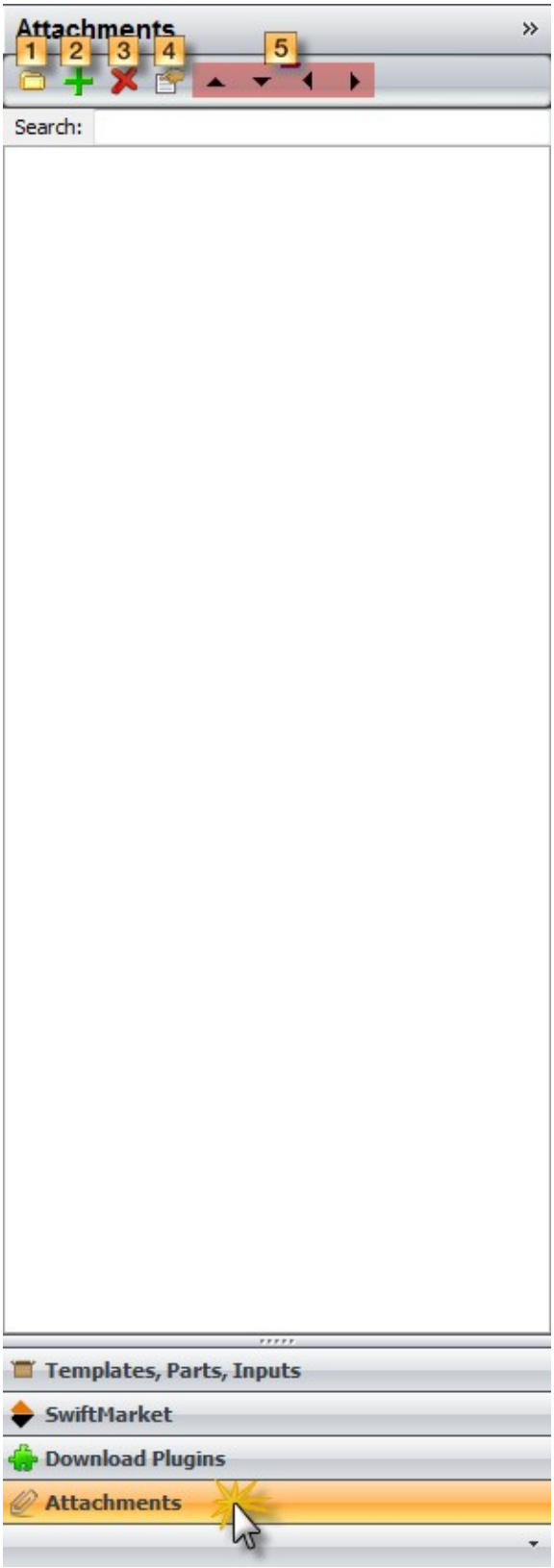
When the bookmark is dragged onto a page, once let go, a note will be left with that bookmarks name.



Now if you drag the mouse over the bookmark link, it will be highlighted in a blue box. If clicked, the bookmark link will open that specific bookmark that you had previously created.

To watch the video about this topic, click here.

How To Add Attachments to a Project



To add attachments to your project, start by opening the attachments sidebar window in PlanSwift.

1. Allows you to create a New Folder for organizing attachments.

2. Allows you to add attachments by opening Windows Explorer. Simply select the desired files in Windows Explorer, and click 'Open'.

3. Allows you to delete any files or folders in the Attachments sidebar.

4. Allows you to view and edit basic and advanced properties regarding the selected attachment. For more information about advanced properties, click here to watch the video.

5. Directional arrows allow you to organize the attachments by moving them up, down, left or right. ***** Moving files left or right is only useful when placing or removing files from folders.***

There is also the option of adding desired attachments to the Attachment sidebar window simply via drag and drop.

If you have multiple attachments for one job, you have the option of searching for a specific attachment or file via the 'Search' bar located at the top of the Attachment sidebar window.

To watch the video about this topic, click here.

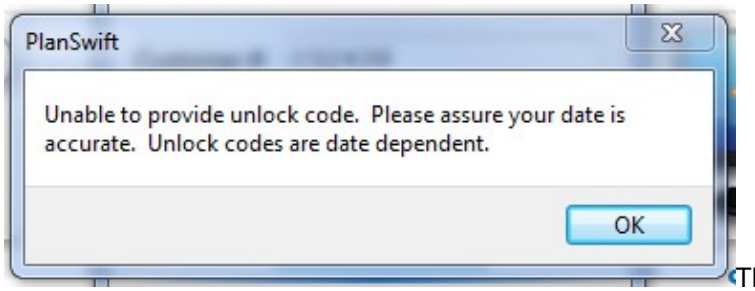
Trouble Shooting Planswift

Tips for common issues you may run into in PlanSwift.

Common Activation Issues

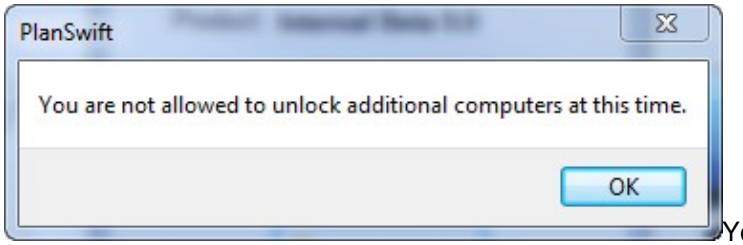
Trouble activating PlanSwift? Check here for solutions.

Unable to provide unlock code. Please assure your date is accurate. Unlock codes are date dependent



This message is common but is easily resolved by checking the date and time on your computer. Right click on the clock in your system tray and select Adjust Date/Time from the right click menu. Simply set the correct date and time in windows and apply the settings. Now retry the activation in PlanSwift.

You are not allowed to unlock additional computers at this time.



You have received this message because you have exceeded the number of activations on your PlanSwift License. Please remove one or more of the activations from one of the activated computers by going to the active computer and going to the help tab in PlanSwift and selecting 'Software License Options' then click 'Remove license'.

Error Connecting. Please Make sure you have an internet connection and try again.

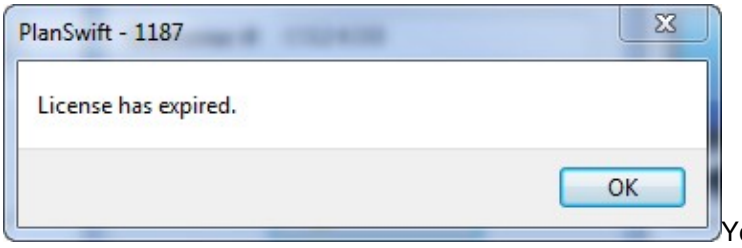
Warning
Error connecting. Please make sure you have an internet connection and try again.
Would you like to obtain an unlock code through your default web browser?
Yes
No

If you received this message you may not be connected to the internet. If you are connected to the internet then the issue is likely due to a firewall that is blocking PlanSwift from gaining access to the internet. Be sure to add a firewall exception to your security program for PlanSwift. For information on setting this up in Windows See this help article - Allow a program to

communicate through Windows Firewall

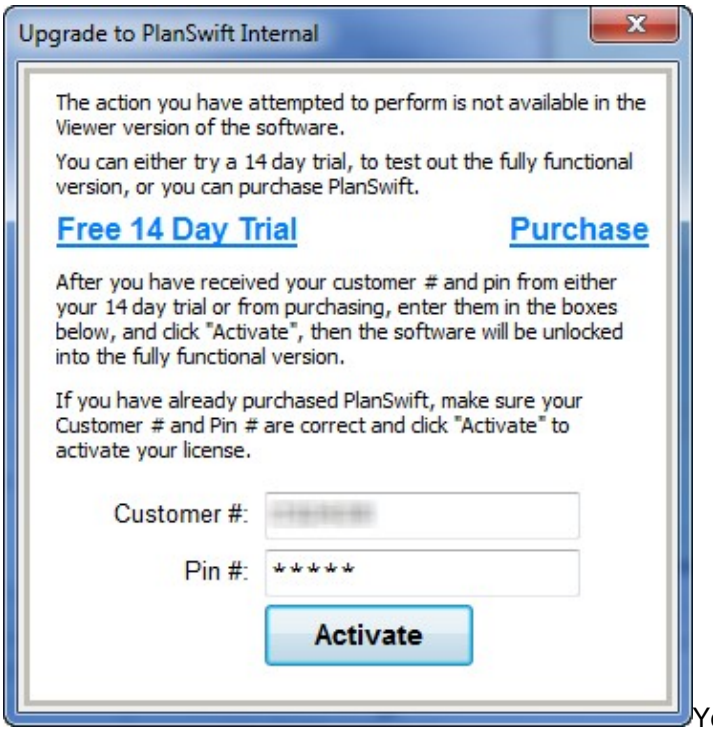
If you do not have access to these settings you can select yes to obtain a code through the default web browser and manually activate PlanSwift. You can also obtain a manual activation by calling our automated activation line at 1-888-752-6794 option 9.

License has expired.



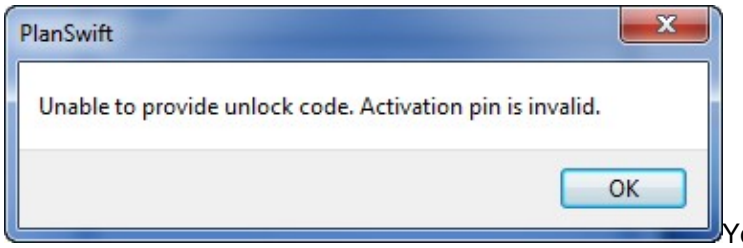
You may receive this message if your PlanSwift account license has expired. This can happen if you have a subscription to PlanSwift or are on a payment plan if a payment was declined or otherwise canceled. If you feel that it was received in error please contact the billing department at 1-888-752-6794 option 3.

The action you attempted to perform is not available in the viewer version of the software.


Upgrade to PlanSwift Internal
The action you have attempted to perform is not available in the Viewer version of the software.
You can either try a 14 day trial, to test out the fully functional version, or you can purchase PlanSwift.
Free 14 Day Trial
Purchase
After you have received your customer # and pin from either your 14 day trial or from purchasing, enter them in the boxes below, and click "Activate", then the software will be unlocked into the fully functional version.
If you have already purchased PlanSwift, make sure your Customer # and Pin # are correct and click "Activate" to activate your license.
Customer #:
Pin #:
*****
Activate

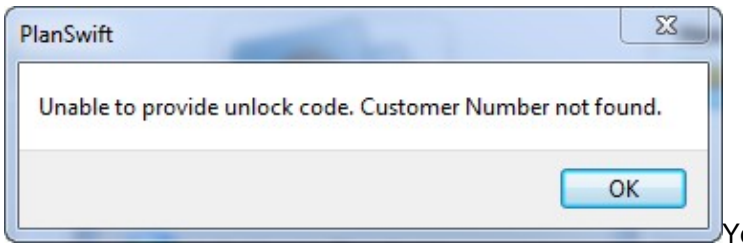
You have received this message because your trial has expired or the activation code on your computer has reached its expiration date. If you have a purchased version of PlanSwift simply press the activate button again to re-validate the computer activation. This typically occurs approximately every 4 months.

Unable to provide unlock code. Activation pin is invalid.



You may receive this error if the PIN number you entered is incorrect. Please re-enter your 5 digit pin number and press Activate. If you do not know your pin number click here to have your activation codes resent to you.

Unable to provide unlock code. Customer Number not found.

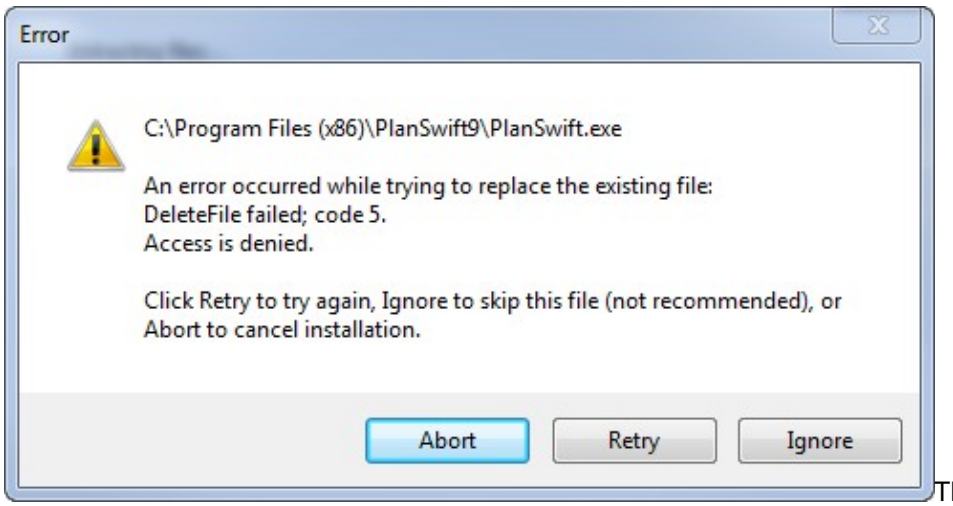


You may receive this message if you entered the wrong customer number. The customer number must be entered using the letter C as the first character. If you do not know your customer number click here to have your activation codes resent to you.

Common Installation / Update Issues

This section contains answers to common installation or update errors and messages.

DeleteFile Failed; code 5. Access is denied.


Error
C:\Program Files (x86)\PlanSwift9\PlanSwift.exe
An error occurred while trying to replace the existing file:
DeleteFile failed; code 5.
Access is denied.
Click Retry to try again, Ignore to skip this file (not recommended), or
Abort to cancel installation.
Abort
Retry
Ignore
This error indicates that there is still an active PlanSwift process running and the installer cannot replace the existing file because it is in use. The most common scenario would be that the PlanSwift program did not close during an update. If you see PlanSwift on the application bar at the bottom of your screen simply right click on it and select Close. Next press Retry on the error message box. If the error persists, restart your computer then run PlanSwift and the update before running any other applications.

Program Errors

Errors you may encounter using PlanSwift.

Error Drawing Overlay. Overlay Image May Be Too Large.

This error is usually caused when there is not enough memory to preform the action. Certain images, depending on the bit depth, can render the image too large as the image has to be re-rendered to a higher bit depth to allow for the transparency layer. One thing that you can try to do in some cases is re-import the drawings at a lower dpi setting like150 with color set to "Black and white".

SwiftMarket Desktop

Online help documentation for the SwiftMarket Desktop software.

What is SwiftMarket Desktop?

Basically it is an items list tool that allows you to create usages for items and assemblies - then takeoff in PlanSwift

It will connect to other data (lists of items) in the future versions

Check back soon for more information on this!

SwiftMarket Desktop Alpha Release Overview Video

http://www.planswift.com/swifttube/player/SwiftTubePlayer2.swf?VID=143&Play=false

To view full screen click on the 'Fullscreen' button on the video player